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foreign agriculture circular

horticultural products

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HORTICULTURAL PRODUCTS REVIEW

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EXPORT SUMMARY

Export value for horticultural products during May totaled \$221 million, \$26 million below a year earlier. May results were largely influenced by a decline in the movement of fresh non-deciduous fruit (mostly apples), along with a poor showing by canned fruit (peaches and fruit cocktail), dried fruit (raisins and prunes) and fresh vegetables. The one bright spot was the continued heavy shipment of fresh citrus, particularly oranges and lemons. Grapefruit quantity slipped in May as exportable supplies tapered off, but total export value benefitted from significantly stronger unit prices. The forecast for horticultural exports during FY 1983 (October 1982-September 1983) remains unchanged at \$2.6 billion, 9 percent below FY 1982.

For further information on items in this circular, contact the Horticultural and Tropical Products Division, (202) 447-6590. All measures in this report, unless noted otherwise, are metric. One kilogram (kg)=2.2046 lbs., 1 metric ton=2,204.6 lbs., 1 liter=0.2642 gallon, and 1 hectare=2.471 acres.

MARKET ACCESS AND OPPORTUNITIES

--Egypt has announced a restrictive import policy for dried fruit and nuts as part of its efforts to discourage imports of "non-essential" goods. Import licenses for these products will be issued only prior to the religious fasting period of Ramadan. This year the open season was March 15-June 15. Products for which licenses are issued must arrive before the end of Ramadan--July 11 this year. Since Ramadan follows a lunar calendar, the dates change from year to year.

--Colombia has eliminated preferential tariff treatment for fresh pears, plums and cherries imported from Chile. The import duty on these products is now 24 percent, the same duty applied to imports from the United States. Previously these Chilean fruits enjoyed duty-free entry. Chile will continue to receive a preferential 18-percent import duty on apples. U.S. apples are assessed a duty of 24 percent. Although the preferential tariffs were removed for Chilean pears, peaches, and plums, these products will still have a trade advantage in Colombia over U.S. products. Because Chile has "free license" status under Colombia's restrictive prior approval licensing system, import licenses for Chilean fruit are usually issued without delays. This is not the case for U.S. products.

--On May 28, 1983, Oman raised import duties from 2 percent to 4 percent on many products. Fresh fruits and vegetables except bananas and plants, trees and flowers were exempted and continue to receive duty-free entry. The tariff on alcoholic beverages was raised from 75 percent to 100 percent.

--New labeling rules for sparkling wines marketed in the European Community (EC) have been proposed by the EC Commission. The proposal stipulates that the following information must be included on labels: product name (sparkling wine or aerated sparkling wine); nominal volume; actual alcoholic strength; residual sugar content; ingredients; and in the case of imported wine, the importer's name and the country in which his head office is located, and the vintner's name and country of origin. Vine variety names and vintage year may be used only under certain conditions. Use of only the English language on labels would be permitted.

--U.S. exporters are advised to obtain USDA grade certificates for exports of fresh fruits and vegetables to Taiwan in order to avoid entry problems. Taiwan customs authorities recently required that imports of oranges, grapes and cherries be accompanied by USDA grade certificates. They have the authority to extend this requirement to all fresh produce.

--The Canadian Government is soon to publish a proposal which will require ingredient labeling on non-retail containers. The Canadians define non-retail containers as (a) the immediate container in which a food is transported and sold for catering use or repackaging into consumer size packages or for further industrial processing, or for re-sale in portions from bulk to consumer; and, (b) the outer containers for prepackaged foods sold to a retailer or commercial institution or enterprise, or directly to a consumer by a wholesaler.

--New food labeling requirements in West Germany will take effect December 26, 1983. Products labeled in accordance with the current requirements must either be sold or withdrawn from retail shelves by that date. The two most important changes introduced by the new rules are: required labeling of ingredients in descending order of importance, and uncoded labeling of minimum shelf life dates on most packaged food products. For products with a minimum shelf life exceeding 18 months and produced before December 26, 1983, the transition period for meeting the new rules extends until December 31, 1986.

More detailed information may be obtained by ordering the recently published "Guide to Selected Food Law Requirements, Federal Republic of Germany." To obtain copies, interested persons should write to Mr. William L. Scholz, Export Promotion Division, Foreign Agricultural Service, Room 4945 South Building, Washington, D.C. 20250.

--Morocco recently imposed a licensing requirement on virtually all imports. The only horticultural products exempt from licensing are essential oils and apple juice concentrate for pharmaceutical use or soft drink production.

MARKET PROMOTION ACTIVITIES

--Wine fairs were held in Montreal, Ottawa and Toronto during the first week of June. They were sponsored by FAS, the Wine Institute, and the Canadian Society of American Wines (SAW). Exhibitors consisted of agents and principles representing 40 wineries from California, Washington, Oregon, Ohio, and New York. Over 1,500 tickets were sold in all three cities with invited members of hotels and restaurants participating free of charge. The program in each city consisted of a one-hour special tasting of Cabernet Sauvignon, a guest speaker and three hours of public wine tastings. All wines were well received with main interest being agency and private importation discussions.

--U.S. foods are to be displayed in Malaysian supermarkets. U.S. exporters are invited to participate in the food promotion, "A Taste of America," to be held in Kuala Lumpur during August and September. A leading retailer is sponsoring this event in coordination with USDA/FAS. The Agricultural Attache in Malaysia suggests that the following products have market potential: a) POPCORN. Popcorn is consumed away from home in Malaysia, but home preparation techniques are not known. Companies should be prepared to support product display with corn popping demonstrations. b) MEXICAN style American foods such as tacos, chips, dips, etc. c) JUICES. Companies should educate Malaysian consumers on the fidelity of U.S. juice products to strict quality standards. d) NEW prepared foods of all types. All transactions will be on a commercial basis between the U.S. companies and the Malaysian stores. For more information on this event, please contact directly:

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COMMODITY UPDATE

--Fruit production is becoming more important in East Germany (GDR). Government policy is encouraging greater production to meet the growing fruit requirements of urban centers. The most important areas for fruit cultivation are located in the central and southern districts because of the favorable soil and climate. Growers throughout these regions produce a wide range of fruits--apples, pears, apricots, sweet and sour cherries, peaches, plums, currants, strawberries and gooseberries. Apples, however, account for over two-thirds of total fruit output which has been running at over 500,000 metric tons annually since 1980.

Twenty cooperative farms are the core of the GDR's fruit industry. As of 1982, these farms had a combined orchard area of 56,000 hectares (40 percent of the total fruit area) and contributed 60 percent of the total fruit volume. The remaining 40 percent of the country's fruit production is from small, individually worked plots.

--Excessive rain and below normal temperatures last spring have led to considerable speculation on prospects for the 1983 potato crop in Northern Europe, particularly the Netherlands and the United Kingdom. Delayed plantings and poor yields may reduce total potato production in these countries by from 10 to 20 percent. Maincrop potato production in the U.K. may fall 4.5 million metric tons versus last year's harvest of 6.3 million metric tons. The Dutch Ministry of Agriculture conservatively estimates a 10-percent drop in 1983 potato production. Potato prices for August/September delivery have risen rapidly, and importers are seeking supplies in surrounding countries. Polish potato production may also be down 10 percent as a result of a Colorado beetle infestation. Pesticides are reportedly in short supply.

--Turkish raisins, figs and filberts are still covered by price supports out of a stabilization fund generated from export taxes. Producers are offered production credits at very favorable rates, but the amount available is extremely limited. The government also continues to provide export credits at reduced rates (30 percent compared to the commercial rate of over 50 percent), but it restricts the amount available as an inflation control measure.

Export tax rates for raisins and figs remain unchanged at 15 and 20 Turkish lira per kilo set in September 1982. Turkish exporters have benefitted from the devaluation of the lira from 173.35 to 216.75 per U.S. dollar since September. The export tax rates for filberts have remained unchanged at the following Turkish lira rates since 1981: shelled natural, 70; unshelled, 35; Picold and damaged, 52; processed from damaged, 52; processed from undamaged, 32.

--Exports of Greek sultanas from the 1982 crop totaled 63,000 metric tons during the first 9 months (September-May) of the 1982/83 marketing year. This should have left available stocks at no more than 12,000 tons at the end of May. Due to a series of currency devaluations and price increases, traders must now pay YDAGEP (the Greek Intervention Agency holding these stocks) 78.00 drachmas/kg., much more than the 66.37 drachmas/kg. paid during the first three months of the marketing year. As a result, export sales from stocks have slowed markedly in recent months. (In late June, 84 drachmas were equal to one U.S. dollar).

--West European cherry production in 1983 will be substantially below the bumper crop harvested during the 1982 season due to excessive rainfall and below normal temperatures. Production estimates for selected countries are as follows, in 1,000 metric tons:

	<u>1981</u>	<u>1982</u>	<u>1983</u> <u>1/</u>
<u>Sweet Cherries</u>			
Belgium	0.6	3.9	4.9
Germany, West	52.1	172.4	130.0
Netherlands	0.2	1.2	1.1
<u>Sour Cherries</u>			
Belgium	5.9	13.3	10.0
Germany, West	65.4	126.0	90.0
Netherlands	0.8	2.7	1.4
<u>Total Cherries</u>			
Belgium	6.5	17.2	14.9
France	83.0	112.8	87.7
Germany, West	117.5	298.4	220.0
Netherlands	1.0	3.9	2.5

1/ Preliminary.

--Termination of the Section 203 investigation of certain canned mushrooms was announced by the International Trade Commission on June 29. The termination followed the withdrawal by domestic producers of their petition requesting extension of import relief. (See Horticultural Products Review, June 1983, page 5.)

OUTLOOK FOR CANNED TOMATO PRODUCTS

Forecasted production of tomatoes for processing in major producing countries in 1983 is 13.7 million metric tons, a 1.3 percent increase over last season's total. Increases in area planted in the European Community reflect bullish market conditions during the 1982/83 season and account for the net rise in total production.

Italy's low 1982 production, coupled with strong foreign and domestic demand, led to high spring prices. In response, Italian planting is up 10 percent. German, English and Dutch traders have reportedly contracted for a substantial portion of the 1983 crop.

Although Greek stocks in the second half of the 1982/83 marketing season were also low, no increase over 1982 production is anticipated. The industry faces a potentially serious cost pinch this season. EC aid levels for Greek paste for 1983/84 entail a 4.7-percent increase in processing subsidies in drachma terms and a 26-percent increase in the minimum grower price. Higher yields and expanded area for harvest may enable French producers to resume 1981/82 production levels.

EC subsidy levels for 1983/84 do not differ substantially from last season's levels. Minimum grower prices (MGP) in terms of European Currency Units (ECU's) will be 2.5 percent higher, while processing subsidies will rise 3.6 percent for canned Roma tomatoes, 4.6 percent for canned San Marzano tomatoes and 3.2 percent for tomatoes for paste. In addition, processing aids for canned tomatoes will be restricted to products for which the weight of packing materials is less than 17 percent of net weight.

New minimum grower prices in Spain are 8 percent higher than last year's, while the MGP established for 1983/84 in Portugal is about 20 percent higher than last year's level. The projected decline in 1983 Spanish acreage is due to irrigation water shortages in major producing areas.

In the four years following the introduction of processor aides in the EC in 1977 and the subsequent granting of more modest subsidies by the Governments of Spain and Portugal, tomato paste production of the five major Mediterranean producers has risen from 430,000 to 650,000 tons. Canned tomato output has risen from 1 million to 1.5 million metric tons. Over the same period, apparent consumption of these products in the EC rose by only 5 and 4 percent, respectively. Noting the trend towards both overproduction and declining world prices resulting from these subsidies, tomato processors in France, Italy, Greece, Spain and Portugal earlier this year called for "quantitative management" and harmonization of aid levels in order to maintain the improved balance between supply and demand experienced during the 1982/83 season.

Imports of competitively priced whole tomatoes, especially from Spain and Italy, along with large whole pack tomato inventories, depressed Canadian prices during the 1982/83 marketing year. In 1982, Canada produced 75,555 tons of whole pack tomatoes and imported 35,071 tons. In an effort to alleviate marketing problems, the Canadian Government announced in March its intent to purchase between 6,500 and 9,500 tons of whole pack tomatoes.

Although area for last winter's crop was increased by over 20 percent, Mexico's 1983 harvest of tomatoes for processing fell an estimated 17 percent due to unfavorable weather in the northwest. Prospects for the upcoming season remain uncertain due to economic instability and price controls on paste which favor the production of uncontrolled products such as ketchup.

Delayed spring planting following heavy spring rains in California is not expected to injure total U.S. production in 1983. During the first 10 months of the 1982/83 marketing year, import levels remained at the high levels which followed the short 1981 crop. Through May of 1983, sauce imports were up 68 percent over last season while paste and canned tomato imports fell 12 and 1 percent, respectively.

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TOMATOES FOR PROCESSING: HARVESTED AREA AND PRODUCTION IN SELECTED COUNTRIES
1981 - 1983

Country	Area (1,000 Hectares)			Production 2/ (1,000 Metric Tons)		
	1981	1982	1983 1/	1981	1982	1983 1/
North America.....	118.4	135.7	134.7	5,810	7,278	7,148
Canada.....	11.1	11.2	11.1	454	476	450
Mexico.....	4.5	5.0	5.5	170	180	150
United States.....	102.8	119.5	118.1 3/	5,186	6,622	6,548 3/
Mediterranean Area....	145.7	150.7	156.3	5,669	5,870	6,212
France.....	9.2	8.9	9.1	377	385	402
Greece.....	21.8	22.4	23.0	1,189	1,178	1,210
Israel.....	3.8	4.9	4.2	181	240	210
Italy.....	80.0	82.0	90.0	3,050	3,020	3,490
Portugal.....	15.0	17.5	18.0	395	480	450
Spain.....	16.0	15.0	12.0	477	567	450
Taiwan.....	4.5	5.3	5.0	274	378	340
Total 4/.....	268.6	291.7	296.0	11,753	13,526	13,700

1/ Forecast for all countries except Mexico and Taiwan. All estimates are preliminary.
2/ Crop for processing in early months of the calendar year in Mexico and Taiwan and in late summer/early fall in all other countries. 3/ Contracted area only. 4/ Totals may not add due to rounding.

SOURCE: Foreign Production Estimates Division, FAS.

July 1983

Horticultural and Tropical Products Division, FAS/USDA

SOUTHERN HEMISPHERE CITRUS SITUATION

Summary: Total 1983 season ^{1/} citrus exports by major producing countries in the Southern Hemisphere are forecast to be up 2 percent over a year earlier. Orange export movement is expected to show a modest increase, largely due to Brazil's efforts to spur sales in Western Europe and the Middle East. South African orange exports will be down only moderately despite this year's short crop. Southern Hemisphere lemon exports will improve somewhat this season, but still remain below the level of 2 years ago. Argentina, in an attempt to make up for lost exports to Eastern Europe, together with South Africa, will aggressively push sales to Western Europe. Price competition from Spain is becoming more pronounced as the Spanish summer lemon crop expands, but Spanish exportable supplies now seem to be running at less than normal due to last winter's freeze. The devalued Argentine peso along with the elimination of the fresh citrus export tax should make Argentine fruit more price attractive. Southern Hemisphere grapefruit exports in 1983 are expected to be close to last year's level despite a substantial increase in production. Distribution problems in Argentina related to recent flooding could upset grapefruit export marketing while supplies of export grade fruit in South Africa are likely to be less than last year.

Southern Hemisphere: Initial fear that Argentina's 1983 citrus crop sustained significant damage from excessive rains throughout the key growing provinces in the northeastern part of the country during May and early June has now been assessed as an overreaction. The internal movement of fruit has been hampered by flooding, although this is not expected to cause a major disruption to the orderly export marketing of fruit. Total citrus production in 1983 is expected to be well above last year. Exportable supplies for all citrus varieties will be more than adequate to cover a heavier export volume. Citrus export movement this season is projected to increase to 71,000 tons, almost half of which will consist of oranges.

In 1981, nearly 75 percent of total lemon exports were destined for Czechoslovakia, Hungary and Poland. These countries did not import any lemons from Argentina in 1982 as they ran short on hard currency reserves. East European importers have suggested that Argentina help finance lemon sales, but exporters appear unable to do so without greater government assistance. While exports to the Netherlands, France and the U.S.S.R. increased sharply, as shown in the following table, total lemon exports in 1982 were cut in half from the 1981 level. Exports of oranges and grapefruit, however, rose significantly in 1982 and are expected to grow moderately this year. Last season's orange and grapefruit exports were shipped exclusively to the European Community.

^{1/} The 1983 Southern Hemisphere shipping season corresponds to 1982/83 in the tables following this article.

ARGENTINA: LEMON EXPORTS

Destination	1981	1982
	-----Metric tons-----	
European Community.....	4,891	8,083
Eastern Europe.....	14,298	---
U.S.S.R.....	---	1,023
Other.....	115	---
Total.....	19,304	9,106

The Argentine government granted producer requests for an elimination of the 10-percent export tax on fresh citrus as a means of providing temporary relief to growers in areas affected by recent heavy rains and flooding. The tax is scheduled to be reinstated on November 27, 1983. The citrus industry is also seeking the implementation of a 20-percent export rebate in order to further stimulate overseas shipments. The export rebate had been set at 7 percent but was abolished in May 1982. The export rebate on concentrated orange and grapefruit juice has been doubled to 10 percent. This rate also expires on November 27, 1983. The export rebate on all other citrus juices remains at 5 percent while the rebate on lemon oil has been removed. There are no export taxes on citrus juice and lemon oil. All processed citrus products also enjoy subsidized pre- and post-export financing with repayment terms ranging from 120 days to one year.

A slight increase is anticipated in the amount of fruit consumed by Argentina's citrus processing industry in 1983. Almost half of all citrus fruit processed will be lemons. Production of both concentrated lemon juice and oil should be up this year with output forecast at 10,000 and 900 tons, respectively. About 30 percent of Argentina's lemon juice outturn is sold locally to the soft drink industry with the balance exported, primarily to Western Europe. Roughly 80 percent of lemon oil output is exported, more than two-thirds going to the United States and the remainder shipped to Western Europe and Mexico. Lemon oil exports in 1983 are forecast at 700 tons compared to 500 tons in 1982; lemon juice exports in 1983 could increase to approximately 8,000 tons.

Australian fresh citrus exports in 1983 are expected to increase slightly despite a smaller citrus outturn. Oranges account for roughly three-fourths of total citrus fruit exports, with the bulk of orange shipments going to Singapore, New Zealand, Hong Kong and Malaysia. In 1983, Australia will try to move larger quantities into the Middle East as well as open the potentially lucrative Japanese market. The Japanese import ban on Australian oranges, because of the presence of the Queensland fruit fly, was lifted for properly treated fruit in June 1982. An experimental shipment was successfully completed last year, and this season's plans call for commercial shipments, mostly navels. Japan's global import quota for oranges, set at 82,000 tons for the year beginning April 1983, is not affected by the arrival of Australian fruit. Australia anticipates stiff competition from the United States which, heretofore, has been virtually the exclusive supplier to Japan.

CITRUS

The amount of fruit absorbed by the citrus processing sector in 1983 is estimated at 255,000 tons, 10 percent below last year. The lower figure is attributed to a reduced fruit availability because of the smaller crop and the non-recurrence of the 1982 frost which compelled the industry to expeditiously utilize a larger amount of damaged fruit last year.

Australian citrus juice consumption has expanded rapidly--annual per-capita orange juice consumption rising from 2 liters to 11 liters during the 1970's--while per-capita fresh fruit consumption has declined. Juice production has trended upward and Australia is now largely self-sufficient in lemon and grapefruit juice. Even with a 9-percent average annual increase in orange juice production over the past decade, growth in orange juice consumption has outstripped local availability; and imports have been necessary to fully satisfy consumer demand. Roughly 25 percent of total juice requirements are met by imports. The lion's share are supplied by Brazil, with the United States providing the balance. U.S. exports of orange juice to Australia in 1982, nearly all frozen concentrate, totaled \$2.1 million.

In December 1982, the Australian government converted the existing variable import tariff on frozen concentrated orange juice (FCOJ), in place since April 1979, to a composite tariff. This significantly increased the tariff protection afforded to the domestic juice industry. At current exchange rates, the import duty on FCOJ from Brazil has increased from \$0.20 per pound of orange juice solids to \$0.38. Under the old formula, FCOJ imports from the United States would have entered duty free but are now taxed at \$0.41 per pound of solids. The specific duty feature of the composite tariff is particularly damaging to U.S. exports since it widens the price advantage already enjoyed by Brazilian juice over U.S. juice. Australian importers now pay a 30 to 35-percent premium for U.S. FCOJ.

Brazil's citrus industry generally flourished during the past decade in response to a growing export volume of frozen concentrated orange juice (FCOJ). Orange outturn, spurred on initially by government incentives and more recently by attractive fruit prices, trended upward. Close to two-thirds of Brazil's expanding orange availability is absorbed by the processing sector for the production of FCOJ which is in turn sold almost exclusively in export markets. The processing industry is centered in the state of Sao Paulo, which accounts for 80 percent of the country's orange production.

This prosperity is now threatened as a result of a weakened international demand for orange juice. An inability to market completely its juice outturn over the past year has led to a major inventory accumulation and the likelihood of a reduced fruit utilization by juice manufacturers in 1983. Grower returns slumped sharply in 1982 and are not likely to improve this year.

By late June, the Brazilians had not yet decided how to cope with this year's excess orange supply. The current crop will make roughly 145 million boxes (40.8 kg. each) available for processing. Even if the industrial yield is low, this season's total availability of concentrate--new crop plus carryover--would be almost 600,000 tons, well above the 420,000 tons processors claim they need to cover expected sales, domestic and export.

Three options to the oversupply problem are being discussed: reduce orange processing volume, divert concentrate production to pellets for cattle feed, or process all the oranges available. A reduction in processing volume implies abandoning oranges in the grove, and thus reducing our crop estimate. Significant diversion to feed production is unlikely because of technical difficulties and the very low price of the end product. The last alternative would force Brazil to decide between storing the excess juice production, a costly proposition, or attempting to export it, perhaps by an adjustment in the minimum export price (MEP). Government officials are currently opposed to lowering the MEP.

The USDA forecast for the 1983 season, shown in the table below, is based upon the following assumptions: 1) All fruit available for processing will be processed except for a small amount of early season fruit which is not included in the production estimate. 2) The industrial yield for FCOJ will be a relatively low 3.4 kg. per box because of rainy weather during the growing season and the possibility of processors utilizing a lighter squeeze in order to maximize the yield of feed pellets. 3) The \$1,100 per ton MEP will not be reduced. Brazil's processors have the physical capacity to store the high stocks implied by these assumptions, but the financial capacity may be lacking.

SAO PAULO: SUPPLY AND DISTRIBUTION OF ORANGES
AND FCOJ, 1981-1983

Item	SEASON 1/		
	1981	1982	1983
		Prelim.	Forecast
ORANGES			
	-----Million Boxes 3/-----		
Production 2/.....	180	195	185
Fresh Consumption.....	26	33	38
Fresh Exports.....	1	2	2
Processed 2/.....	153	160	145
FCOJ--65° Brix			
	-----1,000 Metric Tons 4/-----		
Beginning Stocks.....	38	20	104
Production.....	586	550	493
Domestic Consumption.....	16	16	17
Exports.....	588	450	420
Ending Stocks.(June 30).....	20	104	160
FCOJ yield (kg./box of oranges)....	3.83	3.44	3.40

1/ Harvest and processing normally begins in late April or early May. The marketing season for FCOJ begins on July 1 of each year indicated. 2/ The 1981 figure includes about 7 million boxes of tangerines and tangors; 1982 and 1983 seasons include approximately 5 and 4 million boxes of such fruit, respectively. 3/ 40.8 kilograms or 90 pounds. 4/ One metric ton of 65° brix equals 344.8 gallons of 42° brix concentrate.

CITRUS

Exports of FCOJ during the 1982 season (July 1982-June 1983) are estimated at 450,000 tons compared to a record 588,000 tons a year earlier. The sharp curtailment in export movement is largely attributed to a weakened import demand for Brazilian orange juice in Western Europe. European juice manufacturers chose to work off a large FCOJ inventory built-up during the prior year. The European juice industry demonstrated a preference for lower-priced fruit drinks containing less than 100-percent juice and at the same time turned from citrus to apple and berry juices and drinks.

During the initial months of the 1982 season, a heavier export volume to the United States, resulting from sales activity generated by the January 1982 freeze in Florida, partially offset the smaller movement to Western Europe. Exports to the United States, however, tapered off dramatically during the second half of the season (January 1983-June 1983). The United States and the European Community are the two dominant export outlets for Brazilian FCOJ, as shown below, together taking about 85 percent of all shipments.

BRAZIL: EXPORTS OF FCOJ

Destination	1981 <u>2/</u>	1982 <u>2/</u>
	1,000 Metric Tons	65° brix <u>1/</u>
European Community.....	289	143
United.States.....	260	298
Scandinavia <u>3/</u>	30	20
Canada.....	24	20
Australia.....	4	11
Venezuela.....	4	9
Israel.....	12	6
Japan.....	5	5
Others.....	11	9
Total.....	639	521

1/ One metric ton of 65° brix FCOJ equals 344.8 gallons of 42° brix concentrate. 2/ Official export statistics for a complete 12 month period are available only on a calendar year basis. 3/ Includes Norway, Finland and Sweden.

The outlook for Brazilian FCOJ exports during the 1983 season just initiated calls for further slippage in total movement to about 420,000 tons. Exports to Western Europe are likely to be up somewhat, although importers are reportedly waiting on a significant price reduction before committing themselves to any major purchasing decisions. Negating this is the expectation that exports to the United States will continue to decline from year earlier levels.

Some modifications to the Brazilian government's FCOJ export marketing policy for the 1983 season have been announced. At present, the minimum export price remains at \$1,100 per ton. The export tax has been reduced from 20 percent to 1 percent on shipments to all destinations but the United States. The export tax applicable on exports to the United States was adjusted from 20 percent to 4.51 percent. The export quota for the 1982 season was raised from 416,000 tons to 480,000 tons. The status of 24,000 tons of the 64,000 ton increase which should have been allocated to one of the key exporters remains in doubt. This share of the increase is being held back from the exporting firm for allegedly violating the minimum export price. The 1983 export forecast assumes that the Brazilian government will announce an export quota of roughly 400,000 tons along with a small amount of exports charged against unused 1982 quotas carried forward into the new year.

After considerable delay, the 1983 processing season is soon to be initiated after growers and processors reached an agreement on this year's orange price in the first week of July. Growers are to receive 850 cruzeiros per box of fruit compared to 400 cruzeiros received last year. Payment is based on 150 cruzeiros at time of delivery, a 550 cruzeiro 90 day promissory note issued 90 days after delivery and a 150 cruzeiro cash payment on January 31, 1984. Given the expectation of continued high inflation in Brazil, the 1983 price is probably about equal to last year's price in real terms. The 1983 orange price was roughly equivalent to \$1.27 per 90 pound box, one of the lowest prices in recent years and generally interpreted as a disincentive for production.

In an effort to reduce the oversupply of oranges for processing, Brazil is attempting to increase both domestic fresh consumption and exports of fresh oranges. The direct distribution of oranges in Sao Paulo has continued with a 5 kilo bag of oranges currently selling for approximately 35 U.S. cents.

Greater emphasis will be placed on promoting sales to the Middle East and Western Europe. In 1982, Brazil exported 70,000 tons of oranges of which the European Community took 41,000 tons, United Arab Emirates 11,800 tons, Saudi Arabia 5,700 tons and Canada 4,300 tons. In addition, about 6,000-8,000 tons of tangerines are expected to be exported this year, mostly to Saudi Arabia, the Netherlands and Canada. Fresh citrus exports to the United States are prohibited because of the presence of citrus canker in Brazil.

South Africa's fresh citrus exports will decline in 1983 to roughly 460,000 tons, 4 percent below 1982. The smaller export volume is tied to impaired production prospects as a result of severe drought. Although South Africa's citrus is grown under irrigation, water supplies were sharply depleted and rationing was necessary. Citrus exports in 1983 will also be hurt by the general tendency of this year's fruit to size small. This is particularly true for the grapefruit and lemon crops which last year witnessed significant amounts of undersized fruit that could not be exported. Exportable supplies, however, are expected to hold up reasonably well since overseas sales are likely to get first call on high-quality fruit availabilities while the domestic marketing of citrus will be treated as a residual factor.

CITRUS

The South African Citrus Board continues to promote actively sales in key West European markets including the United Kingdom, West Germany, France and the Netherlands. Despite the Board's efforts, net export returns have declined for three consecutive years. The disappointing export performance is attributed largely to rising export costs combined with aggressive sales efforts on the part of other suppliers in West European markets. This is most evident for lemons which are meeting stiff price competition from increasing supplies out of Spain.

Concern over the export outlook for grapefruit and lemons is slowing the ongoing expansion in these crops. Grower plans for enlarging existing orchards are being closely re-evaluated while less productive orchards are being uprooted. Nevertheless, South Africa should have larger export availabilities of such fruit into the mid-1980's as more trees planted in recent years reach maturity.

The South African government does not publish official export statistics for citrus, and the Citrus Board does not reveal information on shipments. The following tabulation for South African citrus exports was constructed by utilizing import data reported to the United Nations together with USDA estimates:

Destination	Oranges		Grapefruit and Lemons 1/	
	1980	1981	1980	1981
-----1,000 Metric Tons-----				
European Community.....	197	188	69	70
Middle East 2/.....	45	69	2	8
Scandinavia 3/.....	14	14	5	6
Canada.....	9	8	2	1
Others.....	13	11	12	14
Unaccounted 4/.....	62	64	7	11
Total.....	340	354	97	110

1/ U.N. trade data do not break out grapefruit and lemons separately.

2/ Includes Saudi Arabia, United Arab Emirates and Kuwait. 3/ Includes Norway, Finland and Sweden. 4/ It is assumed that most of the exports that are unaccounted for represent shipments to the Middle East.

The 10-percent decline anticipated in the 1983 orange crop will mean that the volume of fruit absorbed by the South African processing industry will again decline sharply. With orange juice consumption expected to continue on the upswing, a juice shortage is anticipated. South Africa, therefore, will be unable to maintain its exporter status for orange juice and will turn to imports in order to bridge the gap between local supply and demand.

Citrus Juice Trade: U.S. participation in the world's citrus juice trade focuses upon its dual role as the largest single country importer of frozen concentrated orange juice (FCOJ) while, at the same time, being a major exporter of citrus juice. The severe freeze damage sustained by the Florida orange crop in January 1981 and again in January 1982 resulted in a major shortfall in U.S. orange juice supplies. In order to bridge the gap between production and consumer demand, U.S. juice processors sharply increased their intake of foreign FCOJ. Imports of FCOJ rose from 100 million gallons (single-strength equivalent) in calendar 1980 to 230 million gallons in 1981, and peaked at 396 million gallons in 1982. Almost 95 percent of these imports originated in Brazil. The balance was largely made up of orange juice supplied by Mexico, the Dominican Republic and Argentina, although a dozen other countries shipped small quantities of FCOJ to the United States last year. With the recovery of this past winter's Florida orange crop and the general anticipation of a larger outturn in 1983/84, import pressure has subsided markedly. According to data supplied by the Florida Citrus Processors Association, FCOJ imports into Florida during the first 5 months of the current processing season, initiated this past December, are running at only 45 percent of last year's pace.

The soft import demand for Brazilian FCOJ is not occurring in the United States alone. Western Europe, which regionally is the largest importer of orange juice, is also undergoing a slowdown in purchasing activity. Juice processors continue to postpone making major import commitments in anticipation of a Brazilian price reduction. Speculation on the magnitude of such a price cut reportedly ranges from 10 to 15 percent of current price levels. In the meantime, European processors are expanding their product lines to include a wider array of drinks and non-citrus juices. This has prompted some concern for the future growth of orange juice consumption in Western Europe, with some importers suggesting that Brazil should act more aggressively to protect its future export potential.

The U.S. trade pattern for orange juice shows imports of FCOJ tending to expand sharply following short orange crops and retreating when domestic supplies return to more normal levels. This allows a stable supply of orange juice to be maintained for U.S. consumers. U.S. orange juice manufacturers have in recent years considered the possibility of substantially increasing their own reserves as a means of regulating domestic juice supplies. But the need for such a practice has been minimized by the large inventory accumulation in Brazil. Since almost all of Brazil's large production is exported, Brazilian FCOJ availability has tended to stabilize or limit increases in Florida orange prices and, therefore, has directly affected grower profitability. This is true even during years when the Florida crop is measurably reduced by poor weather.

U.S. exports of orange juice, largely made up of FCOJ, are declining in terms of volume and as a percentage of world trade. Total U.S. orange juice exports fell from 104 million gallons (single-strength equivalent) during calendar 1981 to 91 million gallons in 1982. The relatively high price of U.S. juice compared to Brazilian FCOJ along with the persistent strength of the U.S. dollar discouraged foreign purchasing last year. Additionally, the severe Florida freeze limited exportable supplies. Canada continues to be the most important export market for U.S. orange juice, with nearly 80 percent of total shipments consisting of FCOJ packed in retail size containers. The European Community is also a key export outlet, particularly for bulk shipments of FCOJ.

U.S. exports of frozen concentrated grapefruit juice (FCGJ) during 1982 totaled 13.0 million single-strength equivalent gallons, down 1.3 million gallons from 1981. The decline is attributed to a reduced movement to the European Community (EC) because of stiffer competition from Israel. Although the production of FCGJ in Israel is much lower than in the United States, nearly all of its outturn is exported to the EC; and, as a result, it is the dominant supplier of that market. Close to three-fourths of the EC's FCOJ imports originate in Israel, with most of the remainder coming from the United States and Argentina. Israeli exports to the EC benefit from a 70-percent duty reduction under the EC's Mediterranean citrus preference system. U.S. exports of FCGJ to Japan are becoming increasingly more important in the overall export picture. Japan is now the leading importer of FCGJ, taking 25 percent of 1982 export volume. Exports have been trending upward in tandem with expansion in Japan's import quota, but potential is much higher with liberalization of Japan's imports. (See following article). FCGJ movement to Canada fell slightly last year. Most exports to Canada are shipped in retail size containers while exports to Japan go almost exclusively in bulk.

Brazilian FCOJ Countervailing Duty Investigation: On July 14, 1982, the Florida Citrus Mutual filed a petition with the U.S. Department of Commerce and the U.S. International Trade Commission (ITC) alleging that imports of FCOJ from Brazil are being subsidized by the Government of Brazil within the meaning of section 701 of the U.S. Tariff Act of 1930. On August 25, 1982, the ITC voted unanimously in a 3 to 0 decision that a "reasonable indication" of injury or threat to injure existed to a U.S. industry by the importation of Brazilian FCOJ.

On December 13, the International Trade Administration (ITA) of the Department of Commerce determined that Brazilian manufacturers, producers or exporters of FCOJ receive subsidies within the meaning of the countervailing duty law. The preliminary estimate of this subsidy was placed at 2.655 percent of the f.o.b. value, port of exit Brazil. ITA's decision was published in the Federal Register on December 17. At that point, U.S. Customs began requiring U.S. importers of Brazilian FCOJ to post a bond equivalent to this subsidy amount (roughly \$29 per metric ton of 65° brix). This was in addition to the U.S. import duty of \$487 per metric ton of 65° brix FCOJ.

The U.S. countervailing duty investigation against imports of Brazilian FCOJ was suspended after an agreement was reached between the two countries on February 24, 1983. The accord called for the Brazilian government to impose an export tax on FCOJ by April 30, to offset the net subsidy provided by the Brazilian government to manufacturers, producers or exporters. The net subsidy amount was established by the U.S. Department of Commerce at 3.51 percent of the f.o.b. value, port of exit Brazil (approximately \$38.50 per ton of 65° brix). A notice of suspension of the investigation was published in the Federal Register on February 2, 1983. This triggered a termination of bond payments by importers and a return by U.S. Customs of all bonds collected up to that date. On February 18, Brazil increased its export duty on FCOJ from 1 to 20 percent. This upward revision of the export tax did not in itself place Brazil in compliance with the agreement. This was accomplished only by the creation of a specific tax category serving exclusively as an offset to the Brazilian government's subsidy.

The countervailing duty investigation was resumed at the request of the Brazilian government. A final subsidy determination was issued by the Department of Commerce in early June. This included a refinement of the preliminary estimate of the 1982 subsidy figure to 2.77 percent along with a subsidy calculation of 3.51 percent for 1983. The International Trade Commission has until July 14, to make its final determination as to whether imports of Brazilian FCOJ are injuring or threatening to injure a U.S. industry. If the ITC rules against injury, the entire issue will be dissolved. If, on the other hand, the ITC rules affirmatively, the agreement between the United States and Brazil will remain in force. If at any time, however, the offsetting export tax is reduced below the net subsidy amount, or any other violation of the agreement occurs, a countervailing duty equal to ITA's subsidy figure becomes effective. This net subsidy amount will be subject to an annual review by the Department of Commerce.

David R. Tallent (202) 382-8897. Production estimates prepared by Lynn Garrett (202) 382-8877.

SELECTED COUNTRIES AND REGIONS: IMPORTS OF FROZEN CONCENTRATED ORANGE JUICE (FCOJ), 1978-1981 ^{1/}
(1,000 METRIC TONS OF 65° BRIX ^{2/})

Destination	YEAR	COUNTRIES OF ORIGIN								TOTAL
		U.S.A.	BRAZIL	ISRAEL	ITALY	MOROCCO	SPAIN	MEXICO	OTHERS	
United States.....	1978	---	100	---	---	---	---	7	1	108
	1979	---	109	---	---	---	---	5	---	115
	1980	---	70	---	---	---	---	2	---	72
	1981	---	156	---	---	---	---	5	3	164
	1982	---	268	---	---	---	---	13	2	283
Canada.....	1978	21	36	---	---	---	---	3	---	59
	1979	25	35	---	---	---	---	2	---	62
	1980	30	33	---	---	---	---	1	---	64
	1981	28	49	---	---	---	---	2	---	79
	1982	23	47	---	---	---	---	2	---	72
European Community (EC) ^{3/}	1978	14	84	32	9	9	5	---	7	161
	1979	13	123	27	9	10	5	---	10	197
	1980	15	160	26	7	7	7	---	8	230
	1981	25	204	27	8	6	6	---	6	282
Other Western Europe ^{4/}	1978	8	39	6	2	---	1	1	8	65
	1979	8	43	6	2	---	---	---	10	69
	1980	9	50	4	2	---	---	---	8	73
	1981	8	40	4	2	---	---	---	6	60
Japan.....	1978	1	1	---	---	---	---	---	---	1
	1979	1	3	---	---	---	---	---	---	4
	1980	---	2	---	---	---	---	---	---	2
	1981	---	3	---	---	---	---	---	---	3
	1982	---	5	---	---	---	---	---	---	5
Australia ^{5/}	1978	---	3	---	---	---	---	---	---	3
	1979	---	12	---	---	---	---	---	---	12
	1980	1	4	---	---	---	---	---	---	5
	1981	1	5	---	---	---	---	---	---	6

---Indicates less than 500 metric tons.

1/ 1982 data not available for some countries. 2/ Import data for most destinations do not specify density of imported juice. Conversions to 65° brix equivalents are USDA estimates. One metric ton of 65° brix concentrate contains 200.84 gallons and is equivalent to 1,393.6 gallons of 11.8° brix single strength juice. 3/ Excludes intra-EC trade, except for imports from Italy. EC import estimates from Israel have been adjusted by USDA. 4/ Norway, Sweden, Finland, Switzerland, and Austria. Imports from other countries are mostly transshipments from EC countries. 5/ Years beginning July 1. Data for 1982 include some estimates.

SOURCE: Official trade statistics of importing countries.

CITRUS

UNITED STATES: EXPORTS OF CITRUS JUICES, 1982
(1,000 SINGLE STRENGTH EQUIVALENT GALLONS 1/)

COUNTRY OR REGION OF DESTINATION	ORANGE JUICE						GRAPEFRUIT JUICE			OTHER CITRUS JUICE 2/		
	FROZEN CONCENTRATE			CONC.,			CONC.,			CONC.,		
	RETAIL	INSTITU-	BULK	NOT	NOT		CONC.,	NOT	NOT	CONC.,	NOT	NOT
	PACK 3/	TIONAL 4/	5/	FROZEN	CONC.		FROZEN	FROZEN	CONC.	FROZEN	FROZEN	CONC.
Canada.....	23,918	2,199	2,434	742	1,340		3,770	588	1,186	7,132	239	567
EC												
Belgium-Lux.....	301	263	1,297	120	13		109	291	7	205	163	---
France.....	304	483	876	69	2,054		69	19	427	23	9	---
Germany, Fed. Rep. of.....	126	697	3,424	421	20		1,365	12	---	499	472	24
Ireland.....	---	---	276	442	---		4	---	---	---	---	---
Italy.....	---	---	---	---	5		---	3	442	---	4	---
Netherlands.....	114	379	4,401	413	3		2,350	85	---	550	78	---
United Kingdom.....	523	521	317	471	49		901	---	13	153	12	78
Other.....	---	1	31	78	2		---	69	2	---	---	1
Total EC.....	1,368	2,344	10,622	2,014	2,146		4,798	479	891	1,430	738	103
OTHER WESTERN EUROPE												
Austria.....	69	260	---	25	---		81	---	---	---	4	---
Iceland.....	64	9	489	23	5		31	6	---	---	---	8
Norway.....	211	125	1,250	77	13		132	---	7	---	---	---
Sweden.....	1,522	252	955	194	---		40	4	---	855	6	---
Switzerland.....	14	681	76	383	177		105	223	23	60	36	---
Other.....	1	---	60	21	---		165	6	---	---	9	2
Total.....	1,881	1,327	2,830	723	195		554	239	30	915	55	10
Total Europe.....	3,249	3,671	13,452	2,737	2,341		5,352	718	921	2,345	793	113
OTHER COUNTRIES												
Australia.....	---	135	1,414	50	---		21	---	---	22	9	---
Bahamas.....	69	84	---	6	42		9	2	4	1,765	10	682
Bermuda.....	63	12	---	2	92		5	4	30	163	63	53
Colombia.....	34	5	1	67	97		6	---	---	6	---	---
China Taiwan.....	77	---	2,167	---	2		82	---	9	47	---	16
Dominican Rep.....	43	---	573	1	2		---	---	---	130	---	189
Hong Kong.....	62	162	352	311	233		17	2	150	38	71	42
Indonesia.....	43	1	110	3	210		---	---	28	2	5	21
Israel.....	---	12	4	---	1		2	---	---	231	---	---
Japan.....	---	9	321	134	195		3,302	7	257	1,478	68	62
Jordan.....	---	---	---	158	---		---	---	---	---	---	3
Korea, Rep. of.....	18	70	2,198	135	842		2	---	---	19	2	1
Kuwait.....	6	12	---	171	74		6	15	30	2	40	20
L.W.W.I.....	20	2	18	63	192		27	5	32	8	2	39
Malaysia.....	11	7	283	783	46		---	---	16	4	1	2
Mexico.....	---	1	220	35	105		2	4	6	76	32	161
Netherlands Antilles.....	176	175	51	93	215		2	2	19	152	224	218
New Zealand.....	---	377	465	---	---		30	---	---	---	---	---
Philippines.....	5	400	236	89	46		---	---	11	1	15	7
Saudi Arabia.....	78	226	33	181	816		141	89	270	44	105	29
Singapore.....	21	4	234	683	127		1	2	40	20	13	22
Thailand.....	1	---	419	---	4		8	---	---	2	---	---
Trinidad and Tobago.....	---	---	6	87	131		---	53	51	2	---	94
United Arab Emirates.....	---	1	---	36	254		2	---	60	---	45	2
Venezuela.....	8	1	148	---	22		---	1	7	11	11	47
Other.....	160	654	284	130	354		174	73	69	33	318	299
Total Other Countries.....	895	2,350	9,537	3,218	4,102		3,839	259	1,089	4,256	1,034	2,009
Grand Total.....	28,062	8,220	25,423	6,697	7,783		12,961	1,565	3,196	13,733	2,066	2,689

--- Indicates less than 500 gallons.

1/ Single strength orange juice (SSOJ) is defined as 11.8° brix. One thousand (1,000) gallons of SSOJ is equal to 238 gallons of 43.4° brix concentrate or 0.718 metric tons of 65° brix concentrate. 2/ Mostly lemon juice. 3/ Containers of less than 32 oz. 4/ Containers of 32 oz., but less than 1 gallon. 5/ Containers of 1 gallon or more.

SOURCE: U.S. Department of Commerce, Bureau of Census.

July 1983

Horticultural and Tropical Products Division, FAS/USDA

CITRUS

TABLE 1

TOTAL CITRUS: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1980/81 TO 1982/83 ^{1/}
(1,000 METRIC TONS)

COUNTRY	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
	1980/81	1981/82	FORECAST 1982/83	1980/81	1981/82	FORECAST 1982/83	1980/81	1981/82	FORECAST 1982/83
NORTHERN HEMISPHERE									
MEDITERRANEAN BASIN									
Cyprus.....	267	278	278	186	212	213	42	48	48
Egypt.....	1,068	1,032	1,040	140	130	152	8	9	9
Gaza ^{2/}	179	180	175	145	144	145	20	8	9
Greece.....	747	952	881	269	348	198	138	146	144
Israel.....	1,335	1,723	1,317	798	738	703	458	794	693
Italy.....	2,799	2,977	2,474	254	267	217	683	1,009	665
Lebanon.....	315	310	325	182	173	124	---	---	---
Morocco.....	977	1,002	1,014	690	605	669	74	96	80
Spain.....	2,962	2,946	2,816	1,622	1,865	1,772	225	210	180
Turkey.....	1,101	1,112	1,135	212	258	258	136	131	134
Subtotal.....	11,750	12,512	11,455	4,498	4,740	4,451	1,784	2,451	1,962
OTHER NORTHERN HEMISPHERE									
Belize.....	64	69	61	---	---	---	64	70	61
Cuba.....	498	523	560	199	229	250	25	30	30
Japan.....	3,484	3,469	3,599	20	19	25	918	637	630
Mexico.....	2,383	2,495	2,290	48	75	29	446	415	420
United States ^{3/}	13,704	10,996	12,257	910	773	859	10,223	7,620	7,526
Subtotal.....	20,133	17,552	18,767	1,177	1,096	1,163	11,676	8,772	8,667
Total Northern Hemisphere:	31,883	30,064	30,222	5,675	5,836	5,614	13,460	11,223	10,629
SOUTHERN HEMISPHERE									
Argentina.....	1,454	1,451	1,560	51	66	71	295	297	308
Australia.....	478	510	468	33	33	35	234	279	251
Brazil.....	10,027	10,662	10,210	67	77	87	6,329	6,615	6,003
Chile.....	122	135	140	4	3	5	---	---	---
South Africa ^{4/}	768	670	639	465	478	460	212	120	97
Uruguay.....	115	115	110	28	20	31	3	3	3
Total Southern Hemisphere:	12,964	13,543	13,127	648	677	689	7,073	7,314	6,663
Grand Total.....	44,847	43,607	43,349	6,323	6,513	6,303	20,533	18,537	17,292

--Indicates zero, negligible, or not available.

^{1/} Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs entirely during the second year shown. ^{2/} Exports do not include shipments to the West Bank. ^{3/} Exports do not include category, "Other Citrus," which consists of bergamots, kumquats, and other non-identified varieties. ^{4/} Includes Swaziland.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attaches or USDA estimates for all other countries.

July 1983

Horticultural and Tropical Products Division, FAS/USDA
Foreign Production Estimates Division, FAS/USDA

CITRUS

TABLE 2

SWEET ORANGES: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1980/81 TO 1982/83 ^{1/}
(1,000 METRIC TONS)

COUNTRY	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
	1980/81	1981/82	FORECAST 1982/83	1980/81	1981/82	FORECAST 1982/83	1980/81	1981/82	FORECAST 1982/83
NORTHERN HEMISPHERE									
MEDITERRANEAN BASIN									
Cyprus.....	136	136	136	92	112	103	18	21	23
Egypt.....	921	895	900	138	128	150	6	7	7
Gaza ^{2/ 3/}	148	150	150	128	125	130	9	2	3
Greece.....	527	704	659	159	228	150	118	122	100
Israel.....	756	1,043	755	529	486	460	190	504	385
Italy.....	1,737	1,752	1,500	113	128	105	410	580	400
Lebanon.....	205	215	225	115	105	75	---	---	---
Morocco ^{4/}	685	695	738	488	420	510	59	77	66
Spain.....	1,699	1,629	1,590	747	885	750	115	87	100
Turkey.....	695	675	680	41	44	45	98	95	95
Subtotal.....	7,509	7,894	7,333	2,550	2,661	2,478	1,023	1,495	1,179
OTHER NORTHERN HEMISPHERE									
Belize.....	43	43	39	---	---	---	43	44	39
Cuba.....	360	360	380	140	150	160	10	10	10
Japan.....	35	37	52	---	---	---	1	1	1
Mexico.....	1,600	1,690	1,480	8	33	10	210	230	240
United States ^{5/}	9,661	7,062	8,729	418	354	410	7,831	5,373	5,900
Subtotal.....	11,699	9,192	10,680	566	537	580	8,095	5,658	6,190
Total Northern Hemisphere:	19,208	17,086	18,013	3,116	3,198	3,058	9,118	7,153	7,369
SOUTHERN HEMISPHERE									
Argentina.....	653	681	700	22	32	34	105	109	112
Australia.....	377	411	382	26	26	27	192	237	213
Brazil.....	9,180	9,792	9,425	60	70	80	6,324	6,610	5,998
Chile.....	60	69	70	---	---	---	---	---	---
South Africa ^{2/ 6/}	603	537	483	354	378	363	169	96	60
Uruguay.....	58	50	60	19	13	20	3	3	3
Total Southern Hemisphere:	10,931	11,540	11,120	481	519	524	6,793	7,055	6,386
Grand Total.....	30,139	28,626	29,133	3,597	3,717	3,582	15,911	14,208	13,755

--Indicates zero, negligible, or not available.

^{1/} Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs entirely during the second year shown. ^{2/} Includes tangerines. ^{3/} Exports do not include shipments to the West Bank. ^{4/} Includes some tangerines. ^{5/} Includes temples. ^{6/} Includes Swaziland.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attaches or USDA estimates for all other countries.

July 1983

Horticultural and Tropical Products Division, FAS/USDA
Foreign Production Estimates Division, FAS/USDA

TABLE 3

TANGERINES: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1980/81 TO 1982/83 ^{1/}
(1,000 METRIC TONS)

COUNTRY	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
	1980/81	1981/82	FORECAST 1982/83	1980/81	1981/82	FORECAST 1982/83	1980/81	1981/82	FORECAST 1982/83
NORTHERN HEMISPHERE									
MEDITERRANEAN BASIN									
Cyprus.....	2	2	2	1	1	1	---	---	---
Egypt.....	70	73	75	---	---	---	1	1	1
Gaza ^{2/}	---	---	---	---	---	---	---	---	---
Greece.....	34	41	44	4	3	5	1	1	2
Israel.....	56	80	75	17	24	30	17	28	40
Italy.....	320	379	300	4	11	5	14	25	10
Lebanon.....	40	35	35	19	28	26	---	---	---
Morocco ^{3/}	280	293	261	199	181	155	10	16	11
Spain.....	906	839	815	625	639	721	75	86	40
Turkey.....	167	175	180	49	66	70	12	11	11
Subtotal.....	1,875	1,917	1,787	918	953	1,013	130	168	115
OTHER NORTHERN HEMISPHERE									
Belize.....	---	---	---	---	---	---	---	---	---
Cuba.....	26	26	30	---	---	---	---	---	---
Japan ^{4/}	3,194	3,113	3,216	20	19	25	888	611	603
Mexico.....	120	130	120	12	20	8	---	---	---
United States ^{5/}	417	401	334	16	13	17	196	166	120
Subtotal.....	3,757	3,670	3,700	48	52	50	1,084	777	723
Total Northern Hemisphere:	5,632	5,587	5,487	966	1,005	1,063	1,214	945	838
SOUTHERN HEMISPHERE									
Argentina.....	237	213	240	1	2	2	1	1	1
Australia.....	29	30	28	5	4	6	1	1	1
Brazil ^{6/}	490	530	449	6	6	6	---	---	---
Chile.....	---	---	---	---	---	---	---	---	---
South Africa ^{2/}	---	---	---	---	---	---	---	---	---
Uruguay.....	31	31	33	2	1	2	---	---	---
Total Southern Hemisphere:	787	804	750	14	13	16	2	2	2
Grand Total.....	6,419	6,391	6,237	980	1,018	1,079	1,216	947	840

--Indicates zero, negligible, or not available.

^{1/} Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs entirely during the second year shown. ^{2/} Tangerine production is small and is included with oranges. ^{3/} Clementines only. ^{4/} Mainly satsumas (also called mandarin or unshu mikan), but also including mandarin hybrids, mainly Hassaku and Iyokan. ^{5/} Includes tangelos, which in recent years accounted for 44 to 51 percent of combined tangerine and tangelo production. ^{6/} State of Sao Paulo only, which apparently accounts for about one-half of Brazil's tangerine production. The 160,000-300,000 of tangerines which are processed are included in the orange production and processing tables.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attaches or USDA estimates for all other countries.

July 1983

Horticultural and Tropical Products Division, FAS/USDA
Foreign Production Estimates Division, FAS/USDA

TABLE 4

LEMONS: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1980/81 TO 1982/83 ^{1/}
(1,000 METRIC TONS)

COUNTRY	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
	1980/81	1981/82	FORECAST 1982/83	1980/81	1981/82	FORECAST 1982/83	1980/81	1981/82	FORECAST 1982/83
NORTHERN HEMISPHERE									
MEDITERRANEAN BASIN									
Cyprus.....	35	48	49	29	33	37	4	6	7
Egypt.....	1	1	1	---	---	---	---	---	---
Gaza ^{2/}	12	10	8	10	9	7	---	---	---
Greece.....	180	200	170	106	117	41	18	21	40
Israel.....	41	60	45	25	28	28	9	12	18
Italy.....	688	791	630	135	126	105	210	353	215
Lebanon.....	50	35	40	36	23	15	---	---	---
Morocco.....	2	4	4	---	1	2	---	---	---
Spain.....	336	450	380	240	330	290	18	24	25
Turkey.....	210	230	240	111	130	125	20	20	23
Subtotal.....	1,555	1,829	1,567	692	797	650	279	436	328
OTHER NORTHERN HEMISPHERE									
Belize.....	---	---	---	---	---	---	---	---	---
Cuba.....	---	---	---	---	---	---	---	---	---
Japan.....	1	1	1	---	---	---	---	---	---
Mexico.....	---	---	---	---	---	---	---	---	---
United States.....	1,079	855	896	179	142	150	686	491	450
Subtotal.....	1,080	856	897	179	142	150	686	491	450
Total Northern Hemisphere:	2,635	2,685	2,464	871	939	800	965	927	778
SOUTHERN HEMISPHERE									
Argentina.....	409	393	450	19	9	11	134	130	135
Australia ^{3/}	41	40	31	1	2	1	21	23	18
Brazil.....	---	---	---	---	---	---	---	---	---
Chile.....	62	66	70	4	3	5	---	---	---
South Africa.....	53	48	48	34	32	32	15	12	12
Uruguay.....	20	18	20	6	4	6	---	---	---
Total Southern Hemisphere:	585	565	619	64	50	55	170	165	165
Grand Total.....	3,220	3,250	3,083	935	989	855	1,135	1,092	943

--Indicates zero, negligible, or not available.

^{1/} Crop year refers to harvest and marketing period which usually begins in late summer and extends through the spring. This corresponds roughly to August-June in the Northern Hemisphere and February-December in the Southern Hemisphere. For the Southern Hemisphere harvest occurs entirely in the second year shown. ^{2/} Exports do not include shipments to the West Bank. ^{3/} Includes small amount of limes.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselor and Attaches or USDA estimates for all other countries.

July 1983

Horticultural and Tropical Products Division, FAS/USDA
Foreign Production Estimates Division, FAS/USDA

TABLE 5

GRAPEFRUIT: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1980/81 TO 1982/83 ^{1/}
(1,000 METRIC TONS)

COUNTRY	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
	1980/81	1981/82	FORECAST 1982/83	1980/81	1981/82	FORECAST 1982/83	1980/81	1981/82	FORECAST 1982/83
NORTHERN HEMISPHERE									
MEDITERRANEAN BASIN									
Cyprus.....	94	92	91	64	66	72	20	21	18
Egypt.....	2	2	2	1	1	1	---	---	---
Gaza ^{2/}	19	20	17	7	10	8	11	6	6
Greece.....	2	3	4	---	---	2	1	2	2
Israel.....	480	538	440	227	200	185	242	250	250
Italy.....	5	4	4	2	2	2	---	---	---
Lebanon.....	20	25	25	12	17	8	---	---	---
Morocco.....	10	6	6	3	3	2	5	3	3
Spain.....	9	10	12	5	6	6	2	1	2
Turkey.....	17	20	22	11	18	18	1	---	---
Subtotal.....	658	720	623	332	323	304	282	283	281
OTHER NORTHERN HEMISPHERE									
Belize.....	21	26	22	---	---	---	21	26	22
Cuba.....	85	110	120	55	75	85	15	20	20
Japan.....	---	---	---	---	---	---	---	---	---
Mexico.....	163	115	110	10	4	4	56	25	20
United States.....	2,503	2,625	2,229	295	261	280	1,492	1,566	1,030
Subtotal.....	2,772	2,876	2,481	360	340	369	1,584	1,637	1,092
Total Northern Hemisphere:	3,430	3,596	3,104	692	663	673	1,866	1,920	1,373
SOUTHERN HEMISPHERE									
Argentina.....	155	164	170	9	23	24	55	57	60
Australia.....	31	29	27	1	1	1	20	18	19
Brazil.....	10	10	10	---	---	---	5	5	5
Chile.....	---	---	---	---	---	---	---	---	---
South Africa ^{3/}	112	85	108	77	68	65	28	12	26
Uruguay.....	6	6	7	1	2	3	---	---	---
Total Southern Hemisphere:	314	294	322	88	94	93	108	92	110
Grand Total.....	3,744	3,890	3,426	780	757	766	1,974	2,012	1,483

--Indicates zero, negligible, or not available.

^{1/} Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs entirely during the second year shown. ^{2/} Exports do not include shipments to the West Bank. ^{3/} Includes Swaziland.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselor and Attaches or USDA estimates for all other countries.

July 1983

Horticultural and Tropical Products Division, FAS/USDA
Foreign Production Estimates Division, FAS/USDA

CITRUS

TABLE 6

OTHER CITRUS: PRODUCTION, EXPORTS, AND PROCESSING IN SELECTED COUNTRIES, 1980/81 TO 1982/83 ^{1/}
(1,000 METRIC TONS)

COUNTRY	PRODUCTION			EXPORTS OF FRESH FRUIT			FRUIT PROCESSED		
	1980/81	1981/82	FORECAST 1982/83	1980/81	1981/82	FORECAST 1982/83	1980/81	1981/82	FORECAST 1982/83
NORTHERN HEMISPHERE									
MEDITERRANEAN BASIN									
Cyprus.....	---	---	---	---	---	---	---	---	---
Egypt ^{2/}	74	61	62	1	1	1	1	1	1
Gaza.....	---	---	---	---	---	---	---	---	---
Greece ^{3/}	4	4	4	---	---	---	---	---	---
Israel.....	2	2	2	---	---	---	---	---	---
Italy ^{4/}	49	51	40	---	---	---	49	51	40
Lebanon.....	---	---	---	---	---	---	---	---	---
Morocco.....	---	4	5	---	---	---	---	---	---
Spain ^{5/}	12	18	19	5	5	5	15	12	13
Turkey ^{5/}	12	12	13	---	---	---	5	5	5
Subtotal.....	153	152	145	6	6	6	70	69	59
OTHER NORTHERN HEMISPHERE									
Belize.....	---	---	---	---	---	---	---	---	---
Cuba ^{2/}	27	27	30	4	4	5	---	---	---
Japan ^{6/}	254	318	330	---	---	---	29	25	26
Mexico ^{7/}	500	560	580	18	18	7	180	160	160
United States ^{7/}	44	53	69	2	3	2	18	24	26
Subtotal.....	825	958	1,009	24	25	14	227	209	212
Total Northern Hemisphere:	978	1,110	1,154	30	31	20	297	278	271
SOUTHERN HEMISPHERE									
Argentina.....	---	---	---	---	---	---	---	---	---
Australia.....	---	---	---	---	---	---	---	---	---
Brazil ^{8/}	347	330	326	1	1	1	---	---	---
Chile.....	---	---	---	---	---	---	---	---	---
South Africa.....	---	---	---	---	---	---	---	---	---
Uruguay.....	---	---	---	---	---	---	---	---	---
Total Southern Hemisphere:	347	330	326	1	1	1	---	---	---
Grand Total.....	1,325	1,440	1,480	31	32	21	297	278	271

--Indicates zero, negligible, or not available.

^{1/} Crop year refers to harvest and marketing period which usually begins in the fall and extends through the spring. This corresponds roughly to October-June in the Northern Hemisphere and April-December in the Southern Hemisphere. For the Southern Hemisphere, harvest occurs entirely during the second year shown. ^{2/} Mostly limes but some sour oranges and other varieties. ^{3/} Citrons and sour oranges. ^{4/} Mostly bergamots. ^{5/} Sour oranges. ^{6/} Summer oranges (natsu mikan or natsu daidai, a hybrid of mandarin with sour orange or pomelo). ^{7/} Limes ^{8/} Limes, State of Sao Paulo only, which apparently accounts for somewhat over one-half of Brazil's lime production.

SOURCE: Crop Reporting Board and U.S. Department of Commerce, Bureau of Census for United States. Reports from U.S. Agricultural Counselors and Attaches or USDA estimates for all other countries.

July 1983

Horticultural and Tropical Products Division, FAS/USDA
Foreign Production Estimates Division, FAS/USDA

THE JAPANESE CITRUS MARKET

Overview: Japan, the world's third largest producer of citrus following the United States and Brazil, plays a critical role in international citrus trade. However, unlike the United States which is a key exporter of both fresh fruit and citrus juice, and Brazil, the leading exporter of orange juice, Japanese citrus trade is by and large structured along import lines. Citrus fruit imports consist of those varieties which either are not commercially grown in Japan (grapefruit) or are produced in only minor volumes (lemons and oranges). Imports of citrus products are mostly orange and grapefruit juice.

The domestic citrus industry, like most of Japan's agriculture, is small scale and traditional in nature. Government programs affecting the citrus sector reflect a national consensus for basic food security and farm income maintenance and, therefore, tend to be inflexible and protectionistic. These programs attempt to preserve the essential characteristics of the Japanese citrus industry. This results in heavy government subsidization of the domestic citrus industry, a restriction of market access to foreign supplies and higher food costs to the Japanese consuming public.

Production: Japan's 1982/83 citrus crop, largely harvested last fall, is estimated at 3.6 million tons. This compares with 12.3 million tons in the United States and 10.4 million tons in Brazil. Approximately 80 percent of Japan's citrus outturn consists of satsumas or mandarin oranges, a tangerine-type fruit. The balance of the citrus crop is made up mostly of tangerine hybrids. This contrasts with Brazil where almost the entire citrus outturn consists of oranges, and the more diversified U.S. citrus industry.

During the decade of the 1960's, Japan experienced a rapid expansion of its citrus area as the government encouraged farmers to divert lands devoted to rice cultivation to other crops. As a result, mandarin orange area increased to 163,000 hectares by 1970, 158 percent more than in 1960. Mandarin orange area continued to rise until it reached a record 173,000 hectares in 1973.

An oversupply of fruit soon became a threat to grower incomes. The Japanese government sponsored its first land use diversion program out of mandarin oranges in the mid-1970s in order to bring availability back in line with local demand. A second diversion scheme, enacted in 1979, continues in operation until its scheduled termination date in 1984. At that time, total mandarin orange area is forecast to decline to 120,000 hectares. Under the current program, growers are eligible to receive from the government up to 663,000 yen (\$2,763) per hectare for conversion to non-citrus crops and 196,000 yen (\$817) for conversion to other types of citrus. 1/

Japanese growers receive a relatively high return for their citrus. In crop season 1981/82, Japanese producers obtained an average of \$16.90 for the equivalent of a 75 pound box of mandarin oranges, twice the average return of California orange growers. Normally, the price disparity is even greater. The California crop was short in 1981/82 and grower prices were, therefore, up sharply over a year earlier. In 1980/81, Japanese mandarin orange growers earned almost 3 times the unit return of California orange producers.

1/ Exchange rate of 1 U.S. dollar equals 240 yen.

Despite the successful completion of the land diversion programs, long-term projections by the Japanese government show mandarin orange outturn in 1990 at 3.5 million tons, more than 20 percent above 1982. This is largely a result of young trees planted during the late 1970s reaching maturity and, therefore, their full yielding capacity.

Trade: Given the concern for domestic producers and the awareness that their own citrus exports reach only minimal levels, Japan's citrus trade posture has been and continues to be highly protectionistic. The Japanese government maintains a system of quotas, high tariffs, and juice blending requirements which severely limit imports of fresh citrus and citrus juices. The citrus trade issue has become a serious point of friction in the agricultural trade relationship between the United States and Japan. The highly publicized, ongoing negotiations which have taken place over the past several months have achieved only limited progress toward the eventual removal of Japanese import barriers.

The most visible and probably the most inhibiting factor to U.S. export growth in Japan is the strict quantitative import controls maintained on fresh oranges and orange and grapefruit juices. During the 1978 Tokyo Round of the Multilateral Trade Negotiations, Japan agreed to increase substantially its annual import ceiling levels for these items on a graduated basis through Japanese fiscal year (JFY) 1983 (April 1983-March 1984). Quotas set for JFY 1983 limit imports of fresh oranges, orange juice and grapefruit juice (both on a 5 to 1 concentrate basis) to 82,000, 6,500 and 6,000 tons, respectively.

The JFY 1983 import quota for fresh oranges is administratively divided into a seasonal quota of 45,500 tons and a general quota of 36,500 tons. Imports under the seasonal quota are restricted to June-August entry while imports under the general quota are eligible for entry throughout the year. The three month seasonal quota period corresponds to Japan's off-season when domestic citrus availability is lowest and imports represent only the barest threat to the local industry. The June-August period actually accounts for no more than one percent of yearly Japanese marketings of domestically produced mandarin oranges. In appreciation of this, the Japanese government has been more generous in its periodic upward adjustments of the seasonal quota. Over the past 5 years, the seasonal quota has doubled while the general quota has been increased only 60 percent.

At present, imports account for only 3 percent of Japan's domestic availability of oranges and tangerines for fresh consumption. Even if Japan's orange imports were to expand to double current levels due to a complete removal of all quantitative trade restrictions, imports would still represent less than 6 percent of total fresh consumption and would pose only minimal marketing adjustments for Japanese fruit. Domestic mandarin oranges could be expected to maintain their competitive position with imported fruit.

Who would be affected by the removal of citrus import quotas? Clearly, the relatively small number of trading firms that are eligible to obtain import licenses would be disadvantaged by trade liberalization. Under the quota system, these firms are able to virtually assure themselves large profit margins. The Japanese consuming public, on the other hand, would be the primary beneficiary. Fresh orange availability would improve because of an enlarged import volume, and retail prices could be lowered.

A growing consumer awareness of the benefits of a free citrus trade was apparent in the results of a nation-wide opinion poll conducted by the Kyodo Research Center and published in major newspapers throughout Japan in April of this year. Approximately 60 percent of all survey respondents indicated that they were in favor of an immediate or staged citrus trade liberalization. Most of those voting yes for liberalization showed a sensitivity to high food costs or expressed the belief that opening the doors of Japan to competition would in the long run lead to a healthier Japanese agriculture.

Another group that would gain from liberalization is the many Japanese importers that would like to participate in the citrus trade but are currently "locked out" because of an inability to obtain import licenses. An increased number of importers could improve the distribution and overall marketing of oranges in Japan.

Japanese juice quotas restrict imports of both orange and grapefruit juice to relatively minor levels. Japanese support for the grapefruit juice quota is particularly difficult for the United States to understand since it appears unnecessary for the protection of any domestic interest. Japan does not produce grapefruit or grapefruit juice, and fresh grapefruit imports into Japan are not faced with volume restrictions. Given that grapefruit juice imports do not have the potential for harming non-existent Japanese grapefruit growers or processors, the grapefruit juice quota can only be viewed as unreasonable.

In addition to the quota system, U.S. orange juice exports to Japan are hampered by a blending requirement. Under Japanese law, imported orange juice must be blended with domestic mandarin orange juice. Imported juice cannot exceed 60 percent of the blended product. This use regulation produces a clear advantage to low priced Brazilian juice over high quality U.S. orange juice.

Japanese fresh citrus imports are further discouraged by high import tariffs. Although duty levels on grapefruit and lemons have been declining since 1980, in accordance with the Tokyo Round of the Multinational Trade Negotiations, citrus import duties remain relatively high. For example, Japan's duty treatment on oranges imported during 1982 ranged from \$183 per ton for fruit which entered June-November, to \$366 per ton for oranges imported during the remainder of the year. This compares with the U.S. tariff of one cent per pound or \$22 per ton.

U.S. Exports: Over the years, successful U.S. efforts to chip away at Japan's restrictive trade measures have resulted in spectacular gains in U.S. citrus exports. Japan developed into our leading export market for both lemons and grapefruit once trade in these items was liberalized in 1964 and 1971, respectively. U.S. orange exports to Japan in recent years have risen in tandem with revisions of the import quota. Currently, Japanese imports of U.S. oranges are exceeded only by Canada and Hong Kong.

The United States is the dominant foreign supplier of fresh citrus to Japan. Virtually all of Japan's imports of oranges and lemons and more than 90 percent of its grapefruit requirements originate in the United States. About 95 percent of Japan's grapefruit juice imports also come from the United States. The U.S. share of Japan's orange juice imports have fallen steadily

from 75 percent in 1977 to approximately 10 percent in 1982. This sharp decline is directly related to the blending requirement and the ensuing uptake in Japanese imports of Brazilian orange juice. The removal of the blending requirement would allow U.S. orange juice to be marketed without losing its identity or high quality characteristics. This would stimulate demand for U.S. juice and reverse the downward market share trend.

In calendar year 1982, U.S. citrus exports to Japan were as follows:

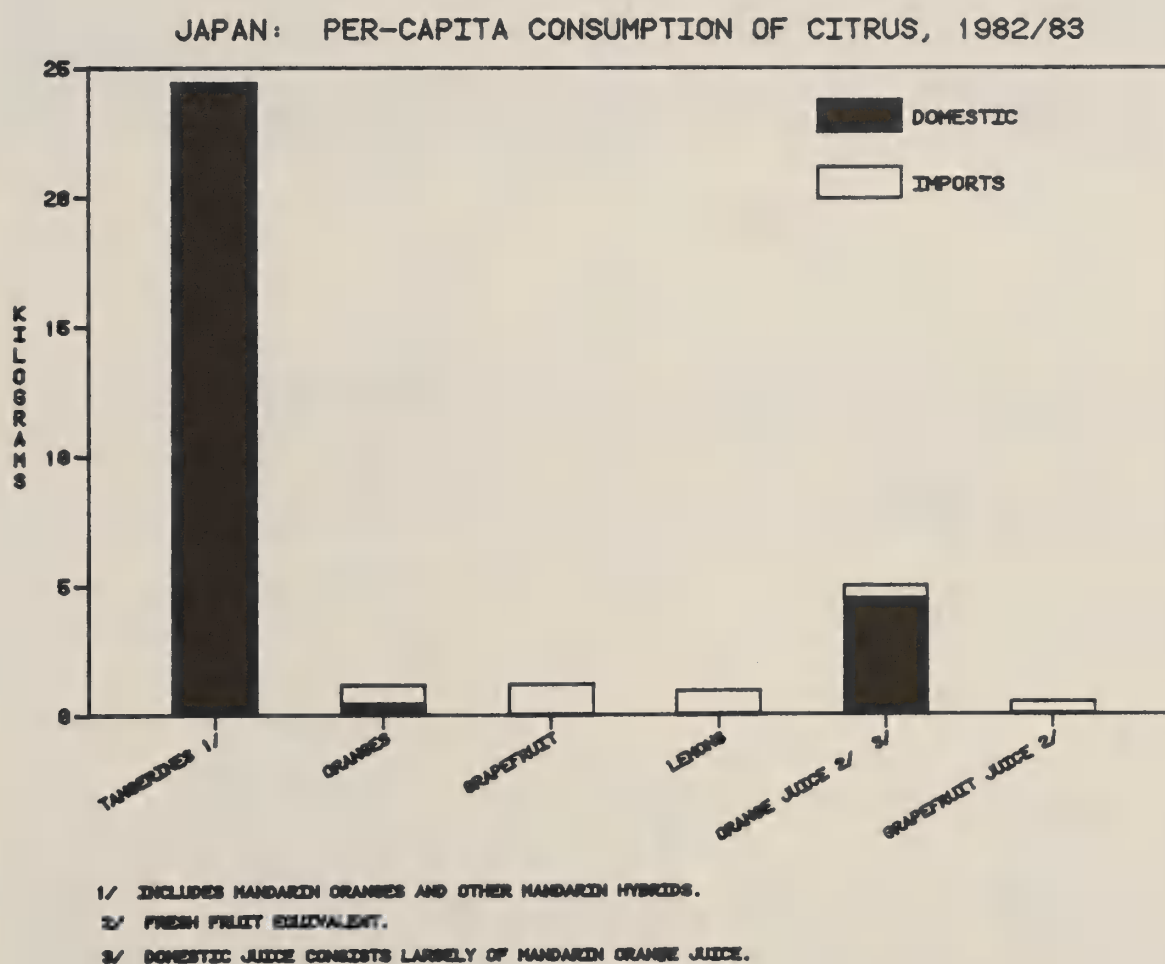
Item	Quantity	Value
Grapefruit.....	139,792 metric tons	\$47.3 million
Lemons.....	107,283	\$69.1
Oranges.....	81,678	\$50.3
Other.....	1,397	\$1.0
Total Citrus Fruit..	330,150	\$167.7
Grapefruit Juice.....	3,565,743 liters 1/	\$4.9 million
Orange Juice.....	658,722 1/	\$1.3
Other.....	1,608,671 1/	\$1.8
Total Citrus Juice..	5,833,136 1/	\$8.0
Grand Total.....		\$175.7 million
1/ Single-strength equivalent		

Utilization: Japanese consumers exhibit a strong preference for fresh produce in their eating habits. Only 20 percent of Japan's citrus production is absorbed by the processing sector. Generally speaking, fruit appearance ranks just as important as taste to the consumer. The strong demand in Japan for U.S. citrus is to a large degree based on its high quality image sustained over the years.

The growth in Japanese consumption of U.S. citrus has occurred despite restrictive import measures which have raised significantly the cost of imported fruit. In 1982, the average wholesale price in Japan of U.S. oranges was approximately \$1,300 per metric ton, more than 125 percent greater than the weighted yearly average wholesale price of domestic mandarin oranges. These high-priced, imported oranges account for less than 3 percent of Japan's fresh consumption of oranges and tangerines.

Unquestionably, the quantitative limits imposed on imports of citrus juice have suppressed consumption. Per-capita orange juice consumption in Japan, including imported and domestically produced mandarin orange juice, is less than one-seventh the 17 liter (single-strength) average of the United States. The disparity between the two countries is even greater for grapefruit juice since Japanese consumption is completely dependent on imports. The average American consumes almost 10 times more grapefruit juice than his Japanese counterpart. While some of this difference can be explained by environmental and cultural dissimilarities, much is attributed to government imposed trade regulations which artificially depress consumption.

Liberalization Benefits: Liberalization of Japan's citrus trade will help reduce the growing U.S. trade deficit with Japan by offering U.S. exporters the opportunity of increasing the flow of citrus export shipments in accordance with market demand signals. Benefits to Japan, while perhaps more subtle, are of no less consequence. The elimination of citrus trade restrictions will place Japan in greater compliance with its obligations under the General Agreement on Tariffs and Trade (GATT) and in proper alignment with its own overall free trade philosophy. This can be done without causing any serious damage to its own domestic mandarin orange growers. Japanese consumers will enjoy an enhanced year-round citrus fruit availability, conceivably at lower unit costs. Japanese consumers will also be in a position to exercise greater freedom of choice in their purchasing decisions. Finally, but by no means least important, citrus trade liberalization will remove a major source of friction in U.S.-Japanese trade relations.



U.S. EXPORTS

SELECTED HORTICULTURAL PRODUCTS : QUANTITY OF U.S. EXPORTS,
MAY AND SEASON-MAY 1983, WITH COMPARISONS

COMMODITY/COUNTRY AND BEGINNING OF SEASON	1982	1983	SEASON- 1982	1983	CHANGE FROM 1982
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ORANGES, FRESH (NOV 1)	15,836	20,028	106,403	113,941	+26 +7
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CANADA.....	1,009	7,773	2,841	17,149	+671 +504
TOTAL EC-TEN.....	840	1,408	659	2,522	+120 +252
FRANCE.....	---	---	---	---	---
GERMANY, FED. REP.....	---	---	---	---	---
IRELAND.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
FINLAND.....	---	---	---	---	---
NORWAY.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	---	---	---	---	---
LATIN AMERICA.....	---	---	---	---	---
BELMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	---	---	---	---	---

AVOCADOS, FRESH (NOV 1)	185	329	1,768	2,106	+78 +19
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CANADA.....	232	368	2,008	1,151	+35 -43
TOTAL EC-TEN.....	---	---	---	---	---
FRANCE.....	---	---	---	---	---
GERMANY, FED. REP.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
FINLAND.....	---	---	---	---	---
NORWAY.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	---	---	---	---	---
LATIN AMERICA.....	---	---	---	---	---
BELMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	---	---	---	---	---

GRAPES, FRESH (SEPT 1)	8,027	3,476	37,899	37,845	-14 ---
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CANADA.....	4,876	3,039	72,105	81,699	+38 +13
TOTAL EC-TEN.....	---	---	---	---	---
FRANCE.....	---	---	---	---	---
GERMANY, FED. REP.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
FINLAND.....	---	---	---	---	---
NORWAY.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	---	---	---	---	---
LATIN AMERICA.....	---	---	---	---	---
BELMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	---	---	---	---	---

LEMONS, FRESH (AUG 1)	8,107	1,267	11,635	9,270	+15 -20
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CANADA.....	268	1,851	12,717	7,269	+590 -43
TOTAL EC-TEN.....	---	---	---	---	---
FRANCE.....	---	---	---	---	---
GERMANY, FED. REP.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
FINLAND.....	---	---	---	---	---
NORWAY.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	---	---	---	---	---
LATIN AMERICA.....	---	---	---	---	---
BELMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	---	---	---	---	---

APPLES, FRESH (JULY 1)	7,751	4,074	60,146	38,941	-47 -35
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CANADA.....	2,640	1,341	14,603	10,522	-49 -28
TOTAL EC-TEN.....	---	---	---	---	---
FRANCE.....	---	---	---	---	---
GERMANY, FED. REP.....	---	---	---	---	---
IRELAND.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
FINLAND.....	---	---	---	---	---
NORWAY.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	---	---	---	---	---
LATIN AMERICA.....	---	---	---	---	---
BELMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	---	---	---	---	---

SELECTED HORTICULTURAL PRODUCTS : QUANTITY OF U.S. EXPORTS,
MAY AND SEASON-MAY 1983, WITH COMPARISONS

COMMODITY/COUNTRY AND BEGINNING OF SEASON	1982	1983	SEASON- 1982	1983	CHANGE FROM 1982
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APPLES, FRESH (JULY 1)	7,751	4,074	60,146	38,941	-47 -35
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CANADA.....	2,640	1,341	14,603	10,522	-49 -28
TOTAL EC-TEN.....	---	---	---	---	---
FRANCE.....	---	---	---	---	---
GERMANY, FED. REP.....	---	---	---	---	---
IRELAND.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
FINLAND.....	---	---	---	---	---
NORWAY.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	---	---	---	---	---
LATIN AMERICA.....	---	---	---	---	---
BELMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	---	---	---	---	---

PEARS, FRESH (JULY 1)	1,909	1,719	23,216	14,412	-10 -34
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CANADA.....	1	---	723	172	-10 -76
TOTAL EC-TEN.....	---	---	---	---	---
FRANCE.....	---	---	---	---	---
GERMANY, FED. REP.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
FINLAND.....	---	---	---	---	---
NORWAY.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	---	---	---	---	---
LATIN AMERICA.....	---	---	---	---	---
BELMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	---	---	---	---	---

GRAPES, FRESH (JUNE 1)	1,521	656	80,704	77,895	-57 -3
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CANADA.....	---	---	---	---	---
TOTAL EC-TEN.....	---	---	---	---	---
FRANCE.....	---	---	---	---	---
GERMANY, FED. REP.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
FINLAND.....	---	---	---	---	---
NORWAY.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	---	---	---	---	---
LATIN AMERICA.....	---	---	---	---	---
BELMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	---	---	---	---	---

LEMONS, FRESH (AUG 1)	8,107	1,267	11,635	9,270	+15 -20
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CANADA.....	268	1,851	12,717	7,269	+590 -43
TOTAL EC-TEN.....	---	---	---	---	---
FRANCE.....	---	---	---	---	---
GERMANY, FED. REP.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
FINLAND.....	---	---	---	---	---
NORWAY.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	---	---	---	---	---
LATIN AMERICA.....	---	---	---	---	---
BELMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	---	---	---	---	---

APPLES, FRESH (JULY 1)	7,751	4,074	60,146	38,941	-47 -35
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CANADA.....	2,640	1,341	14,603	10,522	-49 -28
TOTAL EC-TEN.....	---	---	---	---	---
FRANCE.....	---	---	---	---	---
GERMANY, FED. REP.....	---	---	---	---	---
IRELAND.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
FINLAND.....	---	---	---	---	---
NORWAY.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	---	---	---	---	---
LATIN AMERICA.....	---	---	---	---	---
BELMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	---	---	---	---	---

JUNE 1983

HORTICULTURAL AND TROPICAL PRODUCTS DIVISION, FAS/USDA

JUNE 1983

HORTICULTURAL AND TROPICAL PRODUCTS DIVISION, FAS/USDA

SELECTED HORTICULTURAL PRODUCTS : QUANTITY OF U.S. EXPORTS,
MAY AND SEASON-MAY 1983, WITH COMPARISONS

COMMODITY/COUNTRY AND BEGINNING OF SEASON	1982	1983	SEASON- MAY	CHANGE FROM 1982 MAY-1983
ALMONDS, SHELLED (JULY 1)	283	203	3,014	28
CANADA.....	1,746	1,612	36,957	1,318
TOTAL EC-TEN.....	115	126	1,461	100
BELGIUM-LUX.....	126	126	1,461	100
FRANCE.....	271	126	4,016	33
GERMANY, FED. REP.....	957	872	12,600	-85
IRELAND.....	5	5	20	15
ITALY.....	426	426	136	-66
NETHERLANDS.....	187	233	2,400	24
UNITED KINGDOM.....	161	424	4,273	163
OTHER EUROPE.....	46	400	470	418
NORWAY.....	17	76	1,816	361
SWEDEN.....	77	314	3,504	306
OTHER.....	293	131	1,786	-51
TOTAL EUROPE.....	2,178	2,352	33,155	177
LATIN AMERICA.....	47	11	621	-36
BERMUDA AND CARIBBEAN.....	5	1	22	-4
HONG KONG.....	889	911	9,437	22
JAPAN.....	1,011	436	8,437	-57
OTHER COUNTRIES.....	4,420	3,918	56,441	-502
WORLD TOTAL.....	10,111	10,111	101,111	0

ALMONDS, UNSHELLED (JULY 1)

CANADA.....	3	4	539	473	30	12
TOTAL EC-TEN.....	19	19	357	121	100	86
BELGIUM-LUX.....	1	1	10	10	100	0
DENMARK.....	1	1	10	10	100	0
FRANCE.....	1	1	10	10	100	0
GERMANY, FED. REP.....	1	1	10	10	100	0
ITALY.....	1	1	10	10	100	0
NETHERLANDS.....	1	1	10	10	100	0
UNITED KINGDOM.....	1	1	10	10	100	0
OTHER EUROPE.....	1	1	10	10	100	0
FINLAND.....	1	1	10	10	100	0
ACRWAY.....	1	1	10	10	100	0
SWEDEN.....	1	1	10	10	100	0
OTHER.....	1	1	10	10	100	0
TOTAL EUROPE.....	1	1	10	10	100	0
LATIN AMERICA.....	1	1	10	10	100	0
BERMUDA AND CARIBBEAN.....	1	1	10	10	100	0
HONG KONG.....	1	1	10	10	100	0
JAPAN.....	1	1	10	10	100	0
OTHER COUNTRIES.....	1	1	10	10	100	0
WORLD TOTAL.....	1	1	10	10	100	0

ALMONDS, PREPARED PRES JULY 1

CANADA.....	98	59	1,181	1,223	-40	25
TOTAL EC-TEN.....	1,181	93	10,111	11,223	-1,112	22
BELGIUM-LUX.....	1	1	10	10	100	0
DENMARK.....	1	1	10	10	100	0
FRANCE.....	1	1	10	10	100	0
GERMANY, FED. REP.....	1	1	10	10	100	0
ITALY.....	1	1	10	10	100	0
NETHERLANDS.....	1	1	10	10	100	0
UNITED KINGDOM.....	1	1	10	10	100	0
OTHER EUROPE.....	1	1	10	10	100	0
FINLAND.....	1	1	10	10	100	0
ACRWAY.....	1	1	10	10	100	0
SWEDEN.....	1	1	10	10	100	0
OTHER.....	1	1	10	10	100	0
TOTAL EUROPE.....	1	1	10	10	100	0
LATIN AMERICA.....	1	1	10	10	100	0
BERMUDA AND CARIBBEAN.....	1	1	10	10	100	0
HONG KONG.....	1	1	10	10	100	0
JAPAN.....	1	1	10	10	100	0
OTHER COUNTRIES.....	1	1	10	10	100	0
WORLD TOTAL.....	1	1	10	10	100	0

APRICOTS, CANNED (JUNE 1)

CANADA.....	56	1,296	1,953	1,953	0	51
TOTAL EC-TEN.....	147	15	18,737	18,737	0	40
BELGIUM-LUX.....	1	1	10	10	100	0
DENMARK.....	1	1	10	10	100	0
FRANCE.....	1	1	10	10	100	0
GERMANY, FED. REP.....	1	1	10	10	100	0
ITALY.....	1	1	10	10	100	0
NETHERLANDS.....	1	1	10	10	100	0
UNITED KINGDOM.....	1	1	10	10	100	0
OTHER EUROPE.....	1	1	10	10	100	0
FINLAND.....	1	1	10	10	100	0
ACRWAY.....	1	1	10	10	100	0
SWEDEN.....	1	1	10	10	100	0
OTHER.....	1	1	10	10	100	0
TOTAL EUROPE.....	1	1	10	10	100	0
LATIN AMERICA.....	1	1	10	10	100	0
BERMUDA AND CARIBBEAN.....	1	1	10	10	100	0
HONG KONG.....	1	1	10	10	100	0
JAPAN.....	1	1	10	10	100	0
OTHER COUNTRIES.....	1	1	10	10	100	0
WORLD TOTAL.....	1	1	10	10	100	0

WALNUTS, NOT SHELLED (AUG 1)

CANADA.....	1,865	1,373	16,455	17,784	-1,329	44
TOTAL EC-TEN.....	1,865	1,373	16,455	17,784	-1,329	44
BELGIUM-LUX.....	1	1	10	10	100	0
DENMARK.....	1	1	10	10	100	0
FRANCE.....	1	1	10	10	100	0
GERMANY, FED. REP.....	1	1	10	10	100	0
ITALY.....	1	1	10	10	100	0
NETHERLANDS.....	1	1	10	10	100	0
UNITED KINGDOM.....	1	1	10	10	100	0
OTHER EUROPE.....	1	1	10	10	100	0
FINLAND.....	1	1	10	10	100	0
ACRWAY.....	1	1	10	10	100	0
SWEDEN.....	1	1	10	10	100	0
OTHER.....	1	1	10	10	100	0
TOTAL EUROPE.....	1	1	10	10	100	0
LATIN AMERICA.....	1	1	10	10	100	0
BERMUDA AND CARIBBEAN.....	1	1	10	10	100	0
HONG KONG.....	1	1	10	10	100	0
JAPAN.....	1	1	10	10	100	0
OTHER COUNTRIES.....	1	1	10	10	100	0
WORLD TOTAL.....	1	1	10	10	100	0

U.S. EXPORTS

SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS									
MAY 1982 SEASON-MAY 1983, WITH COMPARISONS									
COMMODITY/COUNTRY	1982	1983	1982	1983	1982	1983	1982	1983	PERCENT
BEGINNING OF SEASON	1982	1983	1982	1983	1982	1983	1982	1983	PERCENT
---(IN METRIC TONS)---									
PEARS, CANNED (JUNE 1)	77	563	428	-86	-24				
CANADA.....	11	266	176	-51	-34				
TOTAL EC-TEN.....	11	100	176	-51	-34				
BELGIUM-LUX.....	1	100	176	-51	-34				
DENMARK.....	4	36	4	-100	-88				
FRANCE.....	4	12	4	-100	-88				
GERMANY, FED. REP.....	2	1	2	-100	-99				
ITALY.....	1	37	37	-100	-99				
NETHERLANDS.....	4	91	107	-70	-18				
UNITED KINGDOM.....	2	25	17	-100	-34				
OTHER EUROPE.....	---	---	---	---	---				
NORWAY.....	---	37	5	---	-85				
SWEDEN.....	15	73	40	---	-45				
OTHER.....	---	---	---	---	---				
TOTAL AMERICA.....	36	63	78	-100	-73				
LATIN AMERICA.....	3	729	345	-64	-53				
BELGIUM-LUX.....	2	25	171	-87	-28				
BERMUDA AND CARIBBEAN.....	3	121	136	-13	-60				
HONG KONG.....	3	121	136	-13	-60				
JAPAN.....	5	9	85	-75	-88				
OTHER COUNTRIES.....	109	1,072	1,149	-63	-47				
WORLD TOTAL.....	254	2,862	2,341	-67	-19				
PINEAPPLE, CANNED (JUNE 1)	551	7,676	8,154	+71	+6				
CANADA.....	258	2,445	1,536	-85	-45				
TOTAL EC-TEN.....	258	2,445	1,536	-85	-45				
BELGIUM-LUX.....	---	---	---	---	---				
DENMARK.....	---	---	---	---	---				
FRANCE.....	14	85	39	-100	-54				
GERMANY, FED. REP.....	42	1,062	51	-100	-95				
ITALY.....	7	36	16	-117	-57				
NETHERLANDS.....	163	1,028	563	-74	-45				
UNITED KINGDOM.....	---	---	---	---	---				
OTHER EUROPE.....	---	---	---	---	---				
NORWAY.....	---	128	3	---	-96				
SWEDEN.....	---	32	182	---	-80				
OTHER.....	---	---	---	---	---				
TOTAL AMERICA.....	255	3,098	1,535	-35	-50				
LATIN AMERICA.....	19	124	192	-100	-85				
BERMUDA AND CARIBBEAN.....	63	450	243	-81	-46				
HONG KONG.....	---	---	---	---	---				
JAPAN.....	22	38	379	+77	+30				
OTHER COUNTRIES.....	55	3	279	-95	-58				
WORLD TOTAL.....	965	12,565	10,790	+21	-14				
MIXTURES > FRUIT, PREP/PRES:	1,396	15,942	12,560	-41	-21				
CANADA.....	338	6,200	5,417	-66	-33				
TOTAL EC-TEN.....	338	6,200	5,417	-66	-33				
BELGIUM-LUX.....	---	---	---	---	---				
DENMARK.....	---	---	---	---	---				
FRANCE.....	---	---	---	---	---				
GERMANY, FED. REP.....	51	332	3,661	+555	+29				
ITALY.....	---	---	---	---	---				
NETHERLANDS.....	169	44	781	-74	-66				
UNITED KINGDOM.....	10	33	321	+237	+7				
OTHER EUROPE.....	---	---	---	---	---				
NORWAY.....	9	521	517	-619	-1				
SWEDEN.....	59	991	1,064	-17	+7				
OTHER.....	41	5	1,525	-63	+25				
TOTAL AMERICA.....	546	10,711	9,586	-13	-11				
LATIN AMERICA.....	177	3,366	1,614	-60	-52				
BERMUDA AND CARIBBEAN.....	85	1,530	1,416	-27	-7				
HONG KONG.....	169	2,273	2,618	+14	+15				
JAPAN.....	367	453	3,666	+24	-9				
OTHER COUNTRIES.....	472	911	7,464	+101	-12				
WORLD TOTAL.....	3,191	44,142	38,587	-2	-13				
PEACHES, CANNED (JUNE 1)	1,735	15,358	11,692	-69	-24				
CANADA.....	253	3,259	6,521	+93	+100				
TOTAL EC-TEN.....	253	3,259	6,521	+93	+100				
BELGIUM-LUX.....	---	---	---	---	---				
DENMARK.....	16	80	13	-100	-84				
GERMANY, FED. REP.....	15	2,193	5,903	---	+164				
ITALY.....	---	---	---	---	---				
NETHERLANDS.....	28	11	234	-61	-25				
UNITED KINGDOM.....	---	---	---	---	---				
OTHER EUROPE.....	---	---	---	---	---				
NORWAY.....	22	537	84	-100	-84				
SWEDEN.....	37	702	652	-3	-7				
OTHER.....	77	1,007	706	-90	-30				
TOTAL AMERICA.....	425	16	266	-55	-43				
LATIN AMERICA.....	170	28	2,074	-83	-63				
BERMUDA AND CARIBBEAN.....	16	12	265	-33	-35				
HONG KONG.....	95	407	1,159	-51	-101				
JAPAN.....	2,639	1,400	9,376	---	---				
OTHER COUNTRIES.....	1,400	2,338	2,456	-31	-32				
WORLD TOTAL.....	5,428	39,692	55,972	-51	-10				

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HORTICULTURAL AND TROPICAL PRODUCTS DIVISION, FAS/USDA

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HORTICULTURAL AND TROPICAL PRODUCTS DIVISION, FAS/USDA

SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS									
MAY 1982 SEASON-MAY 1983, WITH COMPARISONS									
COMMODITY/COUNTRY	1982	1983	1982	1983	1982	1983	1982	1983	PERCENT
BEGINNING OF SEASON	1982	1983	1982	1983	1982	1983	1982	1983	PERCENT
---(IN METRIC TONS)---									
CHERRIES, SWEET & TART, CND:									
CANADA.....	50	371	526	-38	+42				
TOTAL EC-TEN.....	50	371	526	-38	+42				
BELGIUM-LUX.....	1	172	85	---	---				
DENMARK.....	---	---	---	---	---				
FRANCE.....	---	---	---	---	---				
GERMANY, FED. REP.....	---	---	---	---	---				
NETHERLANDS.....	1	---	---	---	---				
UNITED KINGDOM.....	---	---	---	---	---				
OTHER EUROPE.....	---	---	---	---	---				
NORWAY.....	---	---	---	---	---				
SWEDEN.....	1	---	---	---	---				
OTHER.....	---	---	---	---	---				
TOTAL AMERICA.....	50	371	526	-38	+42				
LATIN AMERICA.....	---	---	---	---	---				
BERMUDA AND CARIBBEAN.....	6	81	95	-26	+17				
HONG KONG.....	37	37	95	-26	+17				
JAPAN.....	34	72	646	+110	-30				
OTHER COUNTRIES.....	13	12	297	-9	+56				
WORLD TOTAL.....	158	2,059	3,535	+85	+72				
CHERRIES, MARACHING, CANNED (JULY 1)									
CANADA.....	5	241	206	+177	-15				
TOTAL EC-TEN.....	5	241	206	+177	-15				
BELGIUM-LUX.....	23	119	70	-49	-41				
DENMARK.....	---	---	---	---	---				
FRANCE.....	---	---	---	---	---				
GERMANY, FED. REP.....	---	---	---	---	---				
NETHERLANDS.....	19	73	47	-74	-36				
ITALY.....	3	6	4	-100	-43				
OTHER EUROPE.....	1	---	---	---	---				
NORWAY.....	---	---	---	---	---				
SWEDEN.....	---	---	---	---	---				
OTHER.....	---	---	---	---	---				
TOTAL AMERICA.....	29	142	142	-100	-63				
LATIN AMERICA.....	29	142	142	-100	-63				
BERMUDA AND CARIBBEAN.....	8	169	198	+40	-33				
HONG KONG.....	25	15	293	---	---				
JAPAN.....	35	81	54	-67	+124				
OTHER COUNTRIES.....	127	147	1,644	+16	-7				
WORLD TOTAL.....	127	147	1,644	+16	-7				
ASPARAGUS, CANNED (APRIL 1)									
CANADA.....	1	---	---	---	---				
TOTAL EC-TEN.....	1	---	---	---	---				
BELGIUM-LUX.....	2	---	---	---	---				
DENMARK.....	---	---	---	---	---				
FRANCE.....	---	---	---	---	---				
GERMANY, FED. REP.....	---	---	---	---	---				
UNITED KINGDOM.....	---	---	---	---	---				
OTHER EUROPE.....	---	---	---	---	---				
NORWAY.....	---	---	---	---	---				
SWEDEN.....	---	---	---	---	---				
OTHER.....	---	---	---	---	---				
TOTAL AMERICA.....	14	16	48	+3	+25				
LATIN AMERICA.....	16	24	38	+43	+25				
BERMUDA AND CARIBBEAN.....	3	---	---	---	---				
HONG KONG.....	---	---	---	---	---				
OTHER COUNTRIES.....	1	---	---	---	---				
WORLD TOTAL.....	36	56	140	+55	+26				
CORN, CANNED (AUG 1)									
CANADA.....	143	156	1,331	+9	+51				
TOTAL EC-TEN.....	143	156	1,331	+9	+51				
BELGIUM-LUX.....	26	2,944	19,261	+47	+3				
DENMARK.....	---	---	---	---	---				
FRANCE.....	17	13	306	-52	-29				
GERMANY, FED. REP.....	847	363	7,263	+222	-31				
NETHERLANDS.....	768	1,055	7,420	+74	-2				
ITALY.....	---	---	---	---	---				
OTHER EUROPE.....	---	---	---	---	---				
NORWAY.....	---	---	---	---	---				
SWEDEN.....	---	---	---	---	---				
OTHER.....	---	---	---	---	---				
TOTAL AMERICA.....	14	4	151	-74	+333				
LATIN AMERICA.....	14	4	151	-74	+333				
BERMUDA AND CARIBBEAN.....	321	1,114	606	+142	+68				
HONG KONG.....	---	---	---	---	---				
JAPAN.....	---	---	---	---	---				
OTHER COUNTRIES.....	---	---	---	---	---				
WORLD TOTAL.....	---	---	---	---	---				

JUNE 1983

HORTICULTURAL AND TROPICAL PRODUCTS DIVISION, FAS/USDA

JUNE 1983

HORTICULTURAL AND TROPICAL PRODUCTS DIVISION, FAS/USDA

SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS*									
MAY 1982 SEASON-MAY 1983, WITH COMPARISONS									
COMMODITY/COUNTRY	MAY 1982	MAY 1983	SEASON-1982	MAY 1983	PERCENT	CHANGE FROM 1982	PERCENT	CHANGE FROM 1982	PERCENT
BEGINNING OF SEASON	1982	1983	1982	1983	PERCENT	1982	1983	1982	1983
CHERRIES, SWEET & TART, CND:									
TOTAL EC-TEN	50	31	371	526	+38	+42			
BELGIUM-LUX	1	172	85	1,074	++	++			
DENMARK	---	155	---	761	++	++			
FRANCE	---	---	---	1	---	+287	---		
GERMANY, FED. REP.	---	---	---	16	---	---			
GREECE	1	---	1	670	---	---			
NETHERLANDS	---	---	33	---	-100	-100			
UNITED KINGDOM	---	17	---	133	---	+162	---		
OTHER EUROPE	---	---	---	103	---	---			
NORWAY	---	---	10	5	---	-40	---		
SWEDEN	1	---	5	8	-100	-50	---		
OTHER	---	---	---	54	---	+10	---		
TOTAL EUROPE	2	112	113	1,771	++	++			
LATIN AMERICA	50	---	378	142	-100	-63	---		
BERMUDA AND CARIBBEAN	6	4	81	95	-17	-17	---		
HONG KONG	3	72	927	646	+130	+30	---		
OTHER COUNTRIES	13	12	151	297	-9	+66	---		
WORLD TOTAL	152	292	2,659	3,535	+85	+72	---		
CHERRIES, MARACHINO, CANNED (JULY 1)									
CANADA	5	13	241	206	+177	-15	---		
TOTAL EC-TEN	23	12	119	70	-49	-41	---		
BELGIUM-LUX	---	3	17	8	---	-51	---		
DENMARK	---	2	---	4	---	---	---		
GERMANY, FED. REP.	13	5	73	47	-74	-31	---		
GREECE	---	---	---	4	---	-36	---		
ITALY	---	---	5	1	-100	-85	---		
NETHERLANDS	1	---	---	1	-100	---	---		
OTHER EUROPE	---	---	---	41	---	+45	---		
FINLAND	---	---	28	30	+18	-10	---		
SWEDEN	3	4	37	30	-18	-10	---		
OTHER	---	---	18	---	---	-75	---		
TOTAL EUROPE	26	16	202	145	-40	-28	---		
LATIN AMERICA	27	12	229	155	-36	-32	---		
BERMUDA AND CARIBBEAN	1	15	23	198	+30	+33	---		
HONG KONG	25	19	293	198	-30	-33	---		
JAPAN	2	1	24	54	+67	+124	---		
OTHER COUNTRIES	35	81	717	787	+135	+10	---		
WORLD TOTAL	127	147	1,474	1,644	+16	-7	---		
ASPARAGUS, CANNED (APRIL 1)									
CANADA	1	---	1	---	-100	-100	---		
TOTAL EC-TEN	2	22	40	233	+357	+357	---		
DENMARK	2	6	1	---	---	---	---		
GERMANY, FED. REP.	---	---	2	1	---	---	---		
UNITED KINGDOM	---	13	6	29	+++	+371	---		
OTHER EUROPE	---	---	---	---	---	---	---		
NORWAY	---	---	14	---	---	-100	---		
SWEDEN	---	---	---	3	---	---	---		
TOTAL EUROPE	14	2	16	---	---	-88	---		
LATIN AMERICA	15	24	48	143	+52	+52	---		
BERMUDA AND CARIBBEAN	2	---	2	1	-100	-72	---		
HONG KONG	---	---	---	---	---	---	---		
OTHER COUNTRIES	1	---	2	---	---	-88	---		
WORLD TOTAL	36	56	140	154	+55	+26	---		
WORLD TOTAL	60	80	192	104	+33	-20	---		
CORN, CANNED (AUG 1)									
CANADA	143	166	879	1,331	+9	+51	---		
TOTAL EC-TEN	246	2,974	18,733	19,261	+47	+28	---		
BELGIUM-LUX	2	17	33	263	+222	+222	---		
DENMARK	17	56	333	7,240	+27	---	---		
FRANCE	944	1,075	7,533	5,852	-19	-21	---		
GERMANY, FED. REP.	768	620	7,391	33	-100	-60	---		
GREECE	3	---	36	98	++	+110	---		
IRELAND	---	29	47	151	-74	+333	---		
ITALY	14	34	150	606	+142	+407	---		
NETHERLANDS	14	34	150	4,713	+247	+688	---		
OTHER EUROPE	321	1,114	2,802	4,713	+247	+688	---		
FINLAND	---	---	7	40	+++	+530	---		
NORWAY	15	22	129	266	+42	+106	---		
SWEDEN	206	125	2,041	1,410	-39	-31	---		
OTHER	1,273	476	4,813	3,764	-63	-22	---		
TOTAL EUROPE	3,502	3,472	25,769	24,744	-2	-4	---		
LATIN AMERICA	295	47	1,774	665	-84	-62	---		
BERMUDA AND CARIBBEAN	15	43	54	503	+20	---	---		
HONG KONG	123	336	1,866	1,641	-197	-12	---		
JAPAN	823	711	2,422	13,703	-40	-46	---		
OTHER COUNTRIES	658	711	6,422	59,431	-8	-22	---		
WORLD TOTAL	5,471	5,359	45,461	59,431	-8	-22	---		
HORTICULTURAL AND TROPICAL PRODUCTS DIVISION, FAS									
JUNE 1983									

[illegible]

SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS,
MAY AND SEASON-MAY 1983, WITH COMPARISONS

[illegible]

SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS,
MAY AND SEASON-MAY 1983, WITH COMPARISONS

COMMODITY/COUNTRY AND BEGINNING OF SEASON	MAY 1982	MAY 1983	SEASON- MAY 1982	SEASON- MAY 1983	CHANGE FROM 1982 MAY-80S- MAY
	1982	1983	1982	1983	

POTATO FLAKES AND GRANULES (OCT 1)

COMMODITY/COUNTRY AND BEGINNING OF SEASON	MAY 1982	MAY 1983	SEASON- MAY 1982	SEASON- MAY 1983	CHANGE FROM 1982 MAY-80S- MAY
CANADA.....	41	52	431	496	+27 -6
TOTAL EC-TEN.....	202	354	2,087	2,825	+75 +35
DENMARK.....	---	---	---	---	---
FRANCE.....	109	18	363	27	-25
GERMANY, FED. REP.....	57	152	468	613	+167 +31
GREECE.....	---	---	---	---	---
IRELAND.....	18	---	146	73	-100 -50
NETHERLANDS.....	---	20	38	194	+88 +10
UNITED KINGDOM.....	18	182	1,033	1,900	+961 +84
OTHER EUROPE.....	127	54	807	543	-57 -33
NORWAY.....	162	88	1,106	1,022	-46 -6
SWEDEN.....	134	82	785	498	-39 -37
OTHER.....	625	578	4,784	4,987	+8 +2
TOTAL EUROPE.....	20	41	445	301	-105 -32
LATIN AMERICA.....	3	---	55	15	-100 -73
BERMUDA AND CARIBBEAN.....	6	3	42	10	-50 -76
HONG KONG.....	3,023	1,150	14,160	7,383	-62 -48
JAPAN.....	99	129	999	754	-30 -21
OTHER COUNTRIES.....	3,817	1,952	20,916	13,796	-49 -34
WORLD TOTAL.....	174	186	1,566	1,773	+7 +13

OTHER DEHYDRATED POTATOES...

COMMODITY/COUNTRY AND BEGINNING OF SEASON	MAY 1982	MAY 1983	SEASON- MAY 1982	SEASON- MAY 1983	CHANGE FROM 1982 MAY-80S- MAY
CANADA.....	19	---	32	277	+100 +753
TOTAL EC-TEN.....	---	---	---	---	---
DENMARK.....	---	---	---	---	---
IRELAND.....	---	---	---	---	---
ITALY.....	---	---	---	---	---
NETHERLANDS.....	19	20	20	1	-100 -95
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	113	8	116	8	-100 -96
TOTAL EUROPE.....	132	8	151	289	+94 +91
LATIN AMERICA.....	---	---	---	---	---
BERMUDA AND CARIBBEAN.....	1	7	353	46	-87
HONG KONG.....	---	---	---	---	---
JAPAN.....	27	35	142	153	+31 +7
OTHER COUNTRIES.....	17	89	201	354	+115 +76
WORLD TOTAL.....	351	326	2,424	2,634	+7 +9

TOMATOES, WHOLE, CND (JULY 1)

COMMODITY/COUNTRY AND BEGINNING OF SEASON	MAY 1982	MAY 1983	SEASON- MAY 1982	SEASON- MAY 1983	CHANGE FROM 1982 MAY-80S- MAY
CANADA.....	654	230	9,647	5,617	-65 -40
TOTAL EC-TEN.....	---	---	---	---	---
DENMARK.....	---	---	---	---	---
IRELAND.....	---	---	---	---	---
ITALY.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	---	---	---	---	---
LATIN AMERICA.....	---	---	---	---	---
BERMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	740	334	10,978	7,011	-55 -36

TOMATO PASTE & PULP, CANNED...

COMMODITY/COUNTRY AND BEGINNING OF SEASON	MAY 1982	MAY 1983	SEASON- MAY 1982	SEASON- MAY 1983	CHANGE FROM 1982 MAY-80S- MAY
CANADA.....	242	532	6,496	8,977	+120 +38
TOTAL EC-TEN.....	---	---	---	---	---
DENMARK.....	---	---	---	---	---
IRELAND.....	---	---	---	---	---
ITALY.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	---	---	---	---	---
TOTAL EUROPE.....	---	---	---	---	---
LATIN AMERICA.....	---	---	---	---	---
BERMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	343	617	8,182	11,138	+80 +36

SELECTED HORTICULTURAL PRODUCTS: QUANTITY OF U.S. EXPORTS,
MAY AND SEASON-MAY 1983, WITH COMPARISONS

COMMODITY/COUNTRY AND BEGINNING OF SEASON	MAY 1982	MAY 1983	SEASON- MAY 1982	SEASON- MAY 1983	CHANGE FROM 1982 MAY-80S- MAY
	1982	1983	1982	1983	

GARLIC DEHYDRATED (JAN 1)

COMMODITY/COUNTRY AND BEGINNING OF SEASON	MAY 1982	MAY 1983	SEASON- MAY 1982	SEASON- MAY 1983	CHANGE FROM 1982 MAY-80S- MAY
CANADA.....	53	57	351	280	+8 -20
TOTAL EC-TEN.....	21	25	197	223	+16 +13
DENMARK.....	---	---	---	---	---
FRANCE.....	---	---	---	---	---
GERMANY, FED. REP.....	14	2	52	14	-93
IRELAND.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	8	71	62	124	+88 +100
OTHER EUROPE.....	---	---	---	---	---
FIJIAN.....	1	---	---	---	---
NORWAY.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	17	8	42	21	-100 -32
TOTAL EUROPE.....	39	32	251	287	+17 +14
LATIN AMERICA.....	5	12	275	73	-165 -73
BERMUDA AND CARIBBEAN.....	19	---	111	4	-100 -97
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	5	25	118	157	+378 +32
WORLD TOTAL.....	121	126	1,130	820	+5 -27

ONIONS, DEHYDRATED (JAN 1)...

COMMODITY/COUNTRY AND BEGINNING OF SEASON	MAY 1982	MAY 1983	SEASON- MAY 1982	SEASON- MAY 1983	CHANGE FROM 1982 MAY-80S- MAY
CANADA.....	146	205	990	833	+40 -16
TOTAL EC-TEN.....	300	814	2,088	2,951	+171 +41
DENMARK.....	13	10	37	18	-20 -51
FRANCE.....	25	27	33	88	+600 +168
GERMANY, FED. REP.....	83	344	595	1,048	+311 +76
GREECE.....	---	---	---	---	---
IRELAND.....	---	---	---	---	---
NETHERLANDS.....	---	---	---	---	---
UNITED KINGDOM.....	12	256	1,093	1,177	+80 +8
OTHER EUROPE.....	9	9	37	105	+4 -187
FINLAND.....	---	---	---	---	---
NORWAY.....	---	---	---	---	---
SWEDEN.....	---	---	---	---	---
OTHER.....	32	36	205	131	-74 -49
TOTAL EUROPE.....	352	939	2,480	3,211	+732 +284
LATIN AMERICA.....	---	---	---	---	---
BERMUDA AND CARIBBEAN.....	---	---	---	---	---
HONG KONG.....	---	---	---	---	---
JAPAN.....	---	---	---	---	---
OTHER COUNTRIES.....	---	---	---	---	---
WORLD TOTAL.....	720	1,529	5,090	6,438	+112 +26

WINE, FROM FRESH GRAPES, JAN...

COMMODITY/COUNTRY AND BEGINNING OF SEASON	MAY 1982	MAY 1983	SEASON- MAY 1982	SEASON- MAY 1983	CHANGE FROM 1982 MAY-80S- MAY
CANADA.....	592,434	290,266	2,108,988	1,553,253	-51 -26
TOTAL EC-TEN.....	204,181	145,275	672,806	568,627	-29 -15
DENMARK.....	32,631	39,474	41,240	117,029	+20 +184
FRANCE.....	19,356	---	66,913	4,224	-100 -94
GERMANY, FED. REP.....	2,440	---	14,065	14,534	-12 +3
IRELAND.....	40,847	4,732	86,472	49,345	-88 -43
NETHERLANDS.....	3,099	---	5,481	5,985	-100 +3
UNITED KINGDOM.....	---	---	---	---	---
OTHER EUROPE.....	---	---	---	---	---
FINLAND.....	1,696	---	2,171	---	-100 -100
NORWAY.....	---	---	---	---	---
SWEDEN.....	2,219	---	7,895	17,648	+23 +124
OTHER.....	4,778	---	79,707	37,200	-71 -53
TOTAL EUROPE.....	214,538	156,171	765,293	624,099	-27 -18
LATIN AMERICA.....	48,708	15,971	249,345	118,293	-67 -53
BERMUDA AND CARIBBEAN.....	68,523	82,396	353,228	350,932	-20 -1
HONG KONG.....	6,411	9,439	31,732	39,285	+49 +24
JAPAN.....	37,619	19,272	128,915	135,186	-49 -3
OTHER COUNTRIES.....	39,371	23,159	128,984	106,576	-41 -17
WORLD TOTAL.....	1,007,804	596,774	3,776,485	2,927,624	-41 -22

JUNE 1983

HORTICULTURAL AND TROPICAL PRODUCTS DIVISION, FAS/USDA

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